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ABSTRACT

These 10 units provide supplementary materials for special needs students who are enrolled in regular secretarial and office technology courses in Missouri. The special needs units are designed to facilitate the mainstreaming of students with a wide variety of handicapping and disadvantaged conditions. The units are self-paced and contain simplified line drawings, controlled text, vocabulary development, and mathematics practice exercises. Each unit consists of the following: introduction, objectives, and student assessment; terms and equipment; steps of procedure; skill sheets; activity sheets; and a unit review and performance checklist. Instructor's information includes notes, resources, and answer keys. The units cover the following material: (1) job keeping; (2) proofreading; (3) typing letters; (4) typing tables; (5) basic telephone techniques; (6) using basic business mathematics; (7) banking; (8) incoming mail; (9) outgoing mail; and (10) decision making and organizing work. (KC)

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# SUPPLEMENTARY UNITS FOR Secretarial Technology/Office Technology

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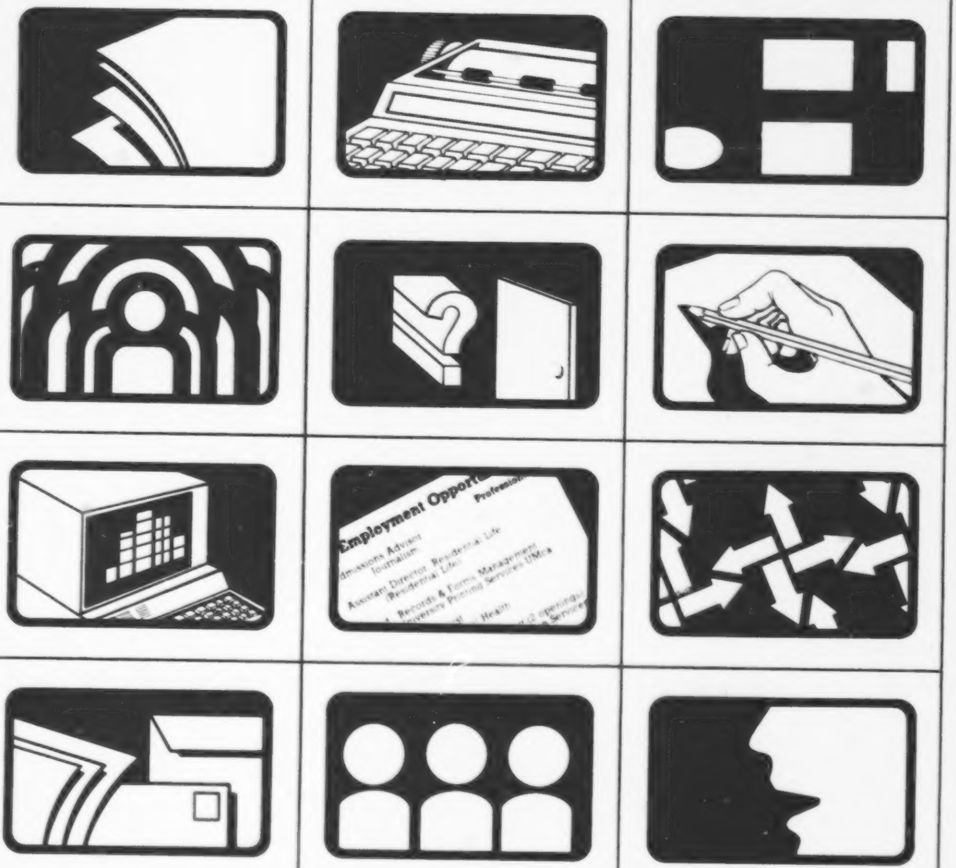

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SN-92-S

## Supplementary Units for
# Secretarial Technology/Office Technology

By Carolyn Rainey

Illustrated By
Crystal Dietiker

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Supplementary Units for

# Secretarial Technology/Office Technology

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Supplementary Units for
# Secretarial Technology/Office Technology

## Preface

Secretarial Technology/Office Technology Supplementary Units are a Special Needs curriculum project sponsored by the Missouri Department of Elementary and Secondary Education, Vocational Special Needs Education. The purpose of this project is to provide supplementary materials for special needs students who are enrolled in regular secretarial and office technology courses.

The special needs units should facilitate the mainstreaming of students with a wide variety of handicapping and disadvantaged conditions. These units are self-paced and contain simplified line drawings, controlled text, vocabulary development, and math practice exercises. Each unit is color-coded as follows:

White: Introduction, Objectives, and Student Assessment - This page presents unit and specific objectives which the student must meet to successfully complete the unit. The introduction contains a brief motivational statement describing the purpose and content of the unit. Student Assessment allows the student to determine whether to study the material in this unit or take the unit exam.

Salmon: Terms and Equipment - This section introduces new terms and equipment necessary for the student to understand and perform the tasks shown in the unit.

Canary: Steps of Procedure - This presents a verbal and illustrated step-by-step explanation of a given skill or task.

Green: Skill Sheets - These pages provide paper and pencil exercises to develop and reinforce the math skills necessary to perform the procedures in the unit.

Blue: Activity Sheets - Various activities are presented to increase student involvement and provide extra practice in performing the procedures.

Pink: Unit Review and Performance Checklist - These sheets are used by the instructor to evaluate student performance. Different forms of review, including identification, matching, multiple-choice, and short answer exercises, are provided.

Curriculum material was developed as hands-on procedural materials for the special needs student and as a resource and guideline to assist the instructor. Responsibility of the instructor will be to adapt the material to suit a particular teaching/learning situation. This material can provide a basis for a variety of uses in a variety of special learning situations.

Instructor's information, located in the front of the book, contains notes to the instructor, helpful resources, and answer keys.

Supplementary Units for

# Secretarial Technology/Office Technology

## Acknowledgments

This Secretarial Technology/Office Technology supplementary guide is a result of the efforts of the following individuals:

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Supplementary Units for

# Secretarial Technology/Office Technology

## General Notes to the Instructor

Step 1: Read through the information in each unit before presenting it to the student.

Step 2: Make sure all equipment to be used in each unit is available.

Step 3: Prepare any handouts, visuals, or supplemental material to aid student learning activities.

Step 4: Provide student with Introduction page.

Step 5: Discuss tasks on Introduction page and give directions for completing the Are You Ready section.

Step 6: Have student complete Introduction page.

Step 7: If student elects to complete the Unit Review and Performance Checklist and does so to your satisfaction, have student proceed to the next unit. If student does not wish to do the exercises, proceed to the next step.

Step 8: Discuss the Introduction page information with the student. At this time you can also discuss the Terms and Equipment lists.

Step 9: Provide student with Steps of Procedure section.

Step 10: Select a means to present the Steps of Procedure. (This will depend upon the capabilities of the student.)
  a. Have student study information independently,
  b. Go through the Steps of Procedure individually or as a group.
  c. Go though the material as a group, then have students work independently.

Step 11: Instructor can demonstrate procedures to the student or class.

Step 12: Allow student time to practice the procedure. Individual judgement by the instructor will determine proper amount of time.

Step 13: Have student complete all Skill Sheets for the unit. Skill Sheets reinforce skills necessary to perform the procedures in the unit and may also be used as a self-evaluation by the student and as points of discussion for the class.

Step 14: Complete any applicable activities listed on the Acitivity Sheets.

Step 15: When student is ready, use the Unit Review and Performance Checklist to evaluate student's performance for that unit.

## Additional Suggestions

- Try a team approach when possible:
  - -Beginning students can work together after instructor's demonstrations.
  - -One student experienced with the procedure can work with a beginner.
- For non-readers or ESL students, audio-visuals of the lessons can be prepared.
- Review equipment with students whenever necessary.
- Exercises can be used as a pencil and paper exercise or in any way instructor feels will help to clarify the material.
- Additional modifications can be made to take care of other disadvantaged/handicapped conditions unique to your situation.

## References

Detailed lists of references and microcomputer software appear in the **Secretarial Technology/Office Technology** curriculum guides (BOE-18-I) for mainstream programs. Since the Special Needs Units supplement these curriculum guides, a separate reference listing is not provided with these supplementary units. Please refer to the following guides:

**Secretarial Technology/Office Technology,** Volume I (BOE-181-I)
Contains units on: Exploring Career Opportunities; Typing; Using Written Communication Skills; and Transcribing.

**Secretarial Technology/Office Technology,** Volume II (BOE-182-I)
Contains units on: Performing Internal Services; Using Oral Communication Skills; Using Office Procedures and Organization Skills; Using Numerical-Clerical Records; and Processing Information.

**Secretarial Technology/Office Technology,** Volume III (BOE-183-I)
Contains units on: Job Seeking; Performing Client-Related Services; Increasing Personal Development; Making Decisions and Solving Problems; and Performing Product-to-Client Transactions.

Available from:

Instructional Materials Laboratory
University of Missouri-Columbia
Columbia, Missouri
314/882-2883

## Helpful Resources for the Special Needs Learner

Changing Times Education Service Division. **Working Today and Tomorrow.** St. Paul, MN: EMC Corporation, 1987.

Daggett, W.R. **The Dynamics of Work.** Cincinnati, OH: South-Western Publishing Co., 1984.

Glahn, S., Welter, C., Mecagin, R. **BO-CEC English Resource Guide.** Fort Collins, CO: National Business Education Association, Colorado State University, n.d.

Goble, D.Y. **How to Get a Job and Keep It.** Austin, TX: Steck-Vaughn Co., 1985.

Grove, D.L. **The Injured Typist Types.** (left or right hand) Portland, ME: J. Weston Walch, Publisher, n.d.

Huffman, H., Mecagni, R., Mongo, C., and Welter, C. **BO-CEC Math Resource Guide.** Fort Collins, CO: National Business Education Association, Colorado State University, n.d.

**Modification of Instruction and Materials for Special Needs Students in Business Education Classes.** Cedar Falls, IA: The Suroski Center, University of Northern Iowa and Area Education Agency VII, 1984.

Napier, D. **Work Attitudes and Human Relations in Business.** Columbia, MO: Instructional Materials Laboratory, University of Missouri-Columbia and Missouri Department of Elementary and Secondary Education, 1987.

**Practical Problems in Mathematics for Office Workers.** Albany, NY: Delmar Publishers Inc., 1982.

Williams, J.P., and Eggland, S.A. **Communicating at Work.** Cincinnati, OH: South-Western Publishing Co., 1979.

Wircenski, Jerry L. **Employability Skills for the Special Needs Learner: An Integrated Program of Reading, Math, and Daily Living Skills.** Rockville, MD: Aspen Publishers, Inc., 1982.

# Special Needs Follow-Up Questionnaire

Staff members, writers, and advisors have worked to make these instructional materials easy to use and easy to read. We welcome your input in the form of suggestions and/or corrections. Please return this questionnaire with your comments to:

Special Needs Editor
Instructional Materials Laboratory
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University of Missouri-Columbia
Columbia, Missouri 65211

Thank you for your time and consideration.

Supplementary Units for

## Secretarial Technology/Office Technology

My overall rating of this publication is:

☐ Excellent ☐ Very Good ☐ Good ☐ Fair ☐ Poor

I would suggest that to improve the materials, IML should:

Other Comments:

OPTIONAL

Name:

Address:

10

## Secretarial Technology/Office Technology

## Class Progress Chart

Student Names:

| | | | | | | | | | | WHAT THE STUDENT CAN DO |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | Demonstrate Jobkeeping Skills |
| | | | | | | | | | | Use Proofreaders' Marks |
| | | | | | | | | | | Type Letters |
| | | | | | | | | | | Type Tables |
| | | | | | | | | | | Demonstrate Telephone Techniques |
| | | | | | | | | | | Use Basic Business Math |
| | | | | | | | | | | Perform Banking Duties |
| | | | | | | | | | | Process Incoming Mail |
| | | | | | | | | | | Process Outgoing Mail |
| | | | | | | | | | | Make Decisions and Organize Work |

Instructor's Signature/Date ______________________________

## Job Keeping
# Skill Sheet 1

**What Skills are Required for Employment?**

A survey of Help Wanted Ads from the February 2, 1986, editions of the St. Louis Post Dispatch, yields some important information. The ads revealed that employers seek employees who possess office knowledge and skills. Further, the ads reveal that employers seek employees who possess desirable personal traits.

The ads in the survey included entry-level clerical and secretarial positions. The skills, listed in random order, included the following:

1. typing
2. shorthand
3. office procedures
4. spelling
5. grammar
6. telephone skills
7. filing
8. data entry
9. record keeping
10. word processing
11. transcribing
12. greeting public
13. processing business forms
14. calculator
15. processing mail
16. proofreading
17. interpersonal skills
18. communication skills

Some of the desirable personal traits requested are shown in random order in the following list.

1. neat
2. accurate
3. friendly
4. tactful
5. personable
6. energetic
7. attractive
8. mature
9. well organized
10. self starter
11. reliable
12. stable
13. pleasant phone voice
14. able to grasp instructions
15. able to work alone, unsupervised
16. positive attitude

**Why Do Teen-agers Lose Jobs?**

This question is answered in the March 1984 edition of **Tomorrow's Business Leader**. Employees think they lose jobs because they lacked experience or training. Employers, however, indicate that teen-agers lose jobs primarily because of absenteeism, tardiness, and inability to get along with other workers.

Activities

List the business skills you have mastered

1 Answers will vary.
2 
3 
4 
5 
6 
7 
8 
9 
10

List several personal traits you feel best describe you. (You may be able to think of other traits in addition to the ones listed above.)

1 Answers will vary.
2 
3 
4 
5 
6 
7 
8

## Job Keeping
# Skill Sheet 2

For the purposes of this activity sheet, networking means using the knowledge of acquaintances to help in getting a job or to advance from one job to the next. An example of networking is applying for a position that a member of your family told you about. In addition to family members, your network can include teachers, friends, employers, and other contacts in industry.

A very important part of the structure of networking is reputation. If a member of your network knows of a position for which you are qualified, he or she will be anxious to tell you about the position and will be happy to serve as a reference. It would be an error to recommend a friend for a position just because he or she is a friend. If the friend does not do well on the job, the network member's reputation with the employer will be damaged.

Another important thing to remember about networking is to keep the network operating. Keep in touch with members of your network. For example, teachers or placement personnel often learn of vacancies throughout the year, not just in April - July when many graduates are looking for initial employment. These important people in our networks should be informed as to whether graduates are still looking for positions or whether graduates are looking for advancement. The same advice applies to present supervisors. Don't forget to let them know that you are interested in advancements.

Finally, it is important to keep adding members to your networking list. You must take the initiative in introducing yourself to people who can help you advance to other positions.

**Activities**

1. List the persons in your present network.

a Answers will vary.
b ______
c ______
d ______
e ______

2. List the ways you plan to keep your network members informed about your employment status.

a. Answers will vary.

b. ______________________________

c. ______________________________

3. **Case Study**

You work in the mail room of a large corporation. You would like to be promoted to a position in the shipping/receiving department. Discuss the steps you would take to add a new member to your network who could help you obtain the promotion.

**Answers will vary. Concepts that could be included are:**

a. **Let your present supervisor know that you are willing to try for advancements. Supervisors can be very good sources of information, can put in a good word when the opportunity is available, and can introduce you to the right people.**

b. **Follow up on introductions. Arrange a meeting with the contact person. Talk about your desire and qualifications for working for that department.**

## Job Keeping
# Skill Sheet 3

Setting goals helps students maintain a positive attitude throughout their school years. When we remember that we want to get an entry-level clerical/secretarial job after graduation, this keeps us motivated.

In order to reach goals, students should set objectives. Objectives are steps which are taken to reach goals. Examples of objectives are to use effective telephone techniques, to prepare a resume, and to compose a letter of application.

The following paragraph from the 1984-85 **Occupational Outlook Handbook** defines the job entitled "Order Clerk."

> Process orders for material or merchandise from customers or establishment employees. Inform customers of receipt or orders, prices, shipping dates, delays, or additional information needed on the orders. May route orders to departments for filling and follow up on orders to insure prompt delivery. May be designated according to method of receiving orders, such as Mail-Order Clerk or Telephone-Order Clerk; or according to type of order handled, such as Back-Order Clerk.

An appropriate goal could be written as follows: **To obtain the position of Order Clerk.** Some appropriate objectives might include the following statements.

I will be able to:

(a) proofread business forms for missing details,
(b) operate an electronic calculator,
(c) make outgoing telephone calls,
(d) fill out a routing slip, and
(e) compare business forms with incoming deliveries.

It is important to remember to set new goals. Getting that first job is not the end of goals. Advancing to jobs which have more responsibilities and better salaries is important in keeping a positive outlook on life.

## Activities

1. Write a goal statement for a position(s) for which you are training.

   Answers will vary.

2. Write three objectives for the position(s) in Question 1.

   a. Answers will vary.
   b.
   c.

3. Compare the following job definitions from the 1984-85 Occupational Outlook Handbook. Underline the new skills in the advanced position. Then write a goal and three objectives for the advanced position.

| **File Clerk** | **Clerical Supervisors, Office or Plant** |
|---|---|
| File correspondence, cards, invoices, receipts, and other records in alphabetical or numerical order, or according to the filing system used. Locate and remove material from file when requested. May be required to classify and file new material. | Supervise and coordinate activities of workers engaged chiefly in one type of clerical function such as typing, filing, bookkeeping, tabulating data, etc. May assume responsibility for completion of work assignments by clerical force being supervised and for the accuracy of completed assignments. |

Write a goal.

To obtain the position of supervisor of the filing department.

List three objectives.

a. Complete a course in personnel management
b. Learn the work assignments of all the positions in the dept.
c. Become thoroughly familiar with departmental policies and procedures
d. Become thoroughly familiar with employee's manual.

## Job Keeping

# Activity Sheet 1

The ability to attract people to you is achieved by good interpersonal skills. The skills involve a positive self-image, good personality traits, and a neat physical appearance. While a comprehensive discussion of interpersonal skills can fill several books, the next three paragraphs are presented to help you in the role-playing activities that follow.

### Developing a Postive Self-Image

Throughout our lives we see people we want to pattern our behavior after. For example, we might think to ourselves: "Gee, I wish I could type as fast as what's her name." A negative self-image can lead to feelings of jealously or cause us to just accept whatever life brings our way. A positive self-image helps us remember that we are worthy individuals and to try to make the best of what we have. We also need to believe that most people are trustworthy and will accept us as we are.

### Developing Good Personality Traits

Personality traits can be thought of as good habits. For example, teenagers become reliable by practicing being on time for classes and by having their homework ready for class. Undesirable traits turn people off and cause them to not want to have anything to do with us. Examples of undesirable traits include always complaining about something, sloppiness, and constantly making excuses.

### Maintaining A Desirable Physical Appearance

An attractive outward appearance depends on feeling good inside as well as looking good on the outside. When we feel good about ourselves, we usually stand or sit erect with our heads up. Good posture, in turn, makes our body work better, and we feel better. Therefore, we can get more work done. People think we are more energetic and friendly. When we look good on the outside, that makes us feel better and gives us confidence in meeting and working with others.

## Role-playing Activities

### Situation 1:

You have to stop on your way to work this morning to have air put into your left front tire. You arrive at work later than normal and have to drive around a few extra minutes to find a parking spot. So you arrive on your floor of the office building realizing that you are late for work. You rush into the office pausing only to say, "Excuse me," to two people standing in your way. You plop into your chair, exhale, and look up to see your supervisor standing there with the new employee for your department. You suddenly realize that you went past them without a greeting (such as, good morning), without saying the supervisor's name (Mrs. Ford), and without your usual smile. You feel a great distance opening up between you and your supervisor. How can you regain a "comfortable" feeling?

**Points to bring out in role-playing activity:**

**The point of view of each person should be considered. The supervisor needs reinforcement. She wants to be treated as an individual who is accepted by all the workers. She also wants the respect of her subordinates. The new worker needs to feel secure--that friendly, helpful people work here. The late employee could apologize briefly without a lot of complaining or making excuses.**

### Situation 2:

You work in the billing department now. However, you have been taking night courses in word processing. During your afternoon break yesterday, you finally got up enough courage to make the acquaintance of Sally who works in word processing. Sally calls today and invites you to walk to a local restaurant for lunch. It is warm outside. You are keeping your blazer on today since you didn't have time to press your blouse. You make some excuse about not feeling well and decline Sally's offer. After you hang up, you wonder whether Sally will call again since you rejected her offer. If you could relive these past two minutes, would you accept the offer?

**Points to bring out in role-playing activity:**

**Being unsure of how we look can cause us to be overly cautious in our dealings with others. We have to feel good about ourselves before we can really have good communications. Anything that shuts off communications must be eliminated or the communications will cease.**

### Situation 3:

Peggy's desk is across from yours. Peggy has recently developed a new habit that annoys you. You have tried to stop speaking to her hoping that she would take the hint. She thinks you are just being mean to her. You both like your jobs very much and both want to stay in the department. How can you begin to let Peggy know how you feel?

**Points to bring out in role-playing activity:**

**The person must be separated from the behavior. It is the behavior that is not liked. Start communicating again. There are two alternative directions.**

1. **Be straightforward. Ask Peggy to do what you want. Be ready to explain the benefits that Peggy will gain.**
2. **If you find you cannot ask Peggy to stop the behavior, try to change to tolerating the behavior.**

# Job Keeping Skills
## Unit Review

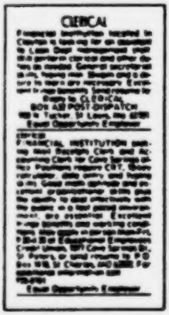
**Directions:** Provide answers fo the following questions.

1. Indicate whether the following terms are (B) business skills or (P) personal traits by writing the correct letter in each blank.
   a. dependability P
   b. typing rate of 50 wpm B
   c. spell medical terms B
   d. transcribe medical reports B
   e. sensitivity P
   f. insincere praise P

2. Indicate whether the following concepts are positive (attracting) interpersonal factors or negative (repulsing) interpersonal factors by circling the correct letter.
   a. trusting others [✓ P] N
   b. losing one's temper P [✓ N]
   c. talking too loudly P [✓ N]
   d. breaking promises P [✓ N]
   e. suggesting alternatives [✓ P] N
   f. embarrassing others P [✓ N]

3. What is networking?
   Using contacts with other people to advance in your work or to find higher positions

4. Choose one of the following ads. Write a goal and three objectives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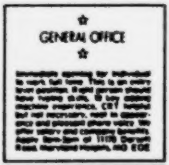
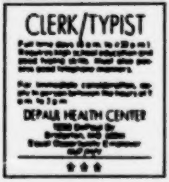
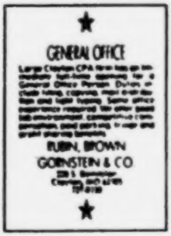

GENERAL OFFICE


CLERK/TYPIST

DEPAUL HEALTH CENTER


GENERAL OFFICE

RUBIN, BROWN
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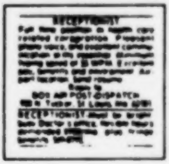
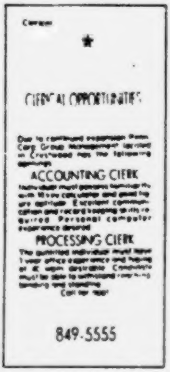
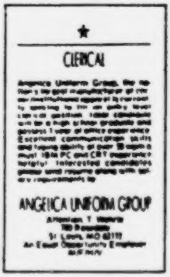

RECEPTIONIST


CLERICAL OPPORTUNITIES

ACCOUNTING CLERK

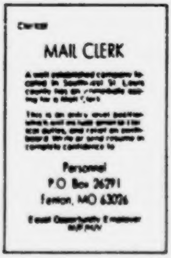
PROCESSING CLERK

849-5555


CLERICAL

ANGELICA UNIFORM GROUP

An Equal Opportunity Employer


MAIL CLERK

Personnel
P.O. Box 26791
Fenton, MO 63026

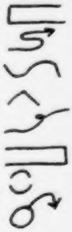
Equal Opportunity Employer

Answers will vary.

BEST COPY AVAILABLE

## Proofreading
# Skill Sheet 1

**Directions**: Match the proofreaders' marks to their meanings by writing the letter for the correct meaning in the space next to the proofreaders' mark.



| | | |
|---|---|---|
| d | 1. | a. delete |
| h | 2. | b. close up |
| f | 3. | c. move right |
| g | 4. | d. move left |
| a | 5. | e. move |
| c | 6. | f. reverse (transpose) |
| b | 7. | g. insert (add) |
| e | 8. | h. run in (no paragraph) |

**Directions**: Write the correct proofreaders' mark in each space provided below.

✓

| | | |
|---|---|---|
| 1. | ∠ or l.c. | lower case (do not capitalize) |
| 2. | ≡ | upper case (capitalize) |
| 3. | # | insert a space |
| 4. | ¶ | start a new paragraph |
| 5. | stet | do not change |
| 6. | ○ | spell out (do not abbreviate) |
| 7. | ss | single space |
| 8. | ds | double space |

# HAPPY MOMENTS WITH SVEN ANDREW

We often enjoy time spent with little children because they are so natural. For example, when Sven Andrew was about three years old, he stayed in the bathroom for a while longer than usual. (Little ones love to play with the paper in the bathroom.) I thought to myself, he is just pulling paper off. For once I'll let him pull off paper to his heart's desire. One roll can't hurt. But soon he came into the kitchen. He had on pajamas that covered him from shoulders to toes. There seemed to be quite a bundle inside his pajamas. "Look, Mommie," he said. "See my cottontail. I'm a bunny!"

When Sven Andrew was about four years old, he watched very quietly one day as I shelled pecans. This time I "accidently" let one shelled half get close to him hoping that he would pick it up, examine it, and ask questions. He surprised me. He popped it into his mouth and began chewing before I had cleaned the hully matter between the ridges. Quickly he spit out the morsel exclaiming, "Mommie, Mommie, there's a skunk in my mouth!"

When Sven was in the first grade, he brought home a pamphlet about plants. Sven had not read through the entire pamphlet. I was reading it over and said, "Sven it says here that if you put a sweet potato in water, you get lots of leaves." I read a little farther. "Sven, it says here that if you put a pineapple in water, it..." "Don't tell me," he said, indicating by his tone that he didn't want to be disturbed further from his toys. "You get a pine tree."

# Proofreading
# Skill Sheet 3

Directions: Use proofreaders' marks to show the correct usage and/or spacing before and after the special keys used in the following sentences. If a sentence is correct, place a "C" in the answer blank provided. Check your work with the answer key. Then, type all the sentences in correct form on a sheet of paper.

## Hyphens

1. Most calls should be placed on a station - to - station basis. ____
2. Each is staffed by factory - trained people who know our calculators ____
3. Each letter will include a two- to three-page brochure. C

## Telephone Numbers

4. If you have a question about our product, call us at 1 800 222-1000. ____
5. Her telephone number is 303 989-2301. ____

## Money

6. Enclosed is our check for $776 in payment of your fee. ____
7. The price will increase from 30 cents to 42 cents. C
8. The prices ranged from $ .95 to $1.09 per ounce. ____

## Quotations

9. He said, "That is all ____
10. The assignment was to read the chapter entitled Skin Care." ____

**Percent**

11 We pride ourselves on helping our clients cut costs by 40 percent. C

| County | 1980 Census | 1985 Census | Percent of Increase | |
|---|---|---|---|---|
| Bloomfield | 200,000 | 250,000 | 25% | C |
| Appleton | 100,000 | 110,000 | 10% | |
| Sweeton | 300,000 | 300,000 | 0% | |

**Number and Symbol Sign**

13.

| Quantity | Description | Unit Price | Total | |
|---|---|---|---|---|
| 8 reams | 20 bond paper | 2.25 | 18.00 | C |
| 6 reams | 16 ditto paper | 1.25 | 7.50 | |

14 Our model No. #118 delivers up to 150 copies per minute.

**KEY**

# Proofreading
# Skill Sheet 3

Directions: Use proofreaders' marks to show the correct usage and/or spacing before and after the special keys used in the following sentences. If a sentence is correct, place a "C" in the answer blank provided. Check your work with the answer key. Then, type all the sentences in correct form on a sheet of paper.

### Hyphens

1. Most calls should be placed on a station - to - station basis. ____
2. Each is staffed by factory - trained people who know our calculators. ____
3. Each letter will include a two- to three-page brochure. c

### Telephone Numbers

4. If you have a question about our product, call us at 1 800 222-1000. ____
5. Her telephone number is 307 989-2301. ____

### Money

6. Enclosed is our check for $776 in payment of your fee. ____
7. The price will increase from 30 cents to 42 cents. c
8. The prices ranged from $ .95 to $1.09 per ounce. ____

### Quotations

9. He said, "That is all. ____
10. The assignment was to read the chapter entitled Skin Care." ____

### Percent

11. We pride ourselves on helping our clients cut costs by 40 percent. c

| County | 1980 Census | 1985 Census | Percent of Increase | |
|---|---|---|---|---|
| Bloomfield | 200,000 | 250,000 | 25% | c |
| Appleton | 100,000 | 110,000 | 10 % | ____ |
| Sweeton | 300,000 | 300,000 | 0 % | ____ |

### Number and Symbol Sign

13.

| Quantity | Description | Unit Price | Total | |
|---|---|---|---|---|
| 8 reams | 20 bond paper | 2.25 | 18.00 | c |
| 6 reams | 16 # ditto paper | 1.25 | 7.50 | ____ |

14. Our model No. #118 delivers up to 150 copies per minute. ____

# Proofreading
# Skill Sheet 4

Directions: Below you will find a list of products that appeared in a catalog. A purchase order has been prepared to request some of the products. Proofread the purchase order to make sure it has been prepared correctly. Use proofreaders' marks to correct any errors that you find on the purchase order.

OFFICE SUPPLY CATALOG

| | | |
|---|---|---|
| Removable Transparent Tape | | |
| B30-591, 1" wide tape | $5.75 ea | |
| B30-590, 3/4" wide tape | $4.35 ea | |
| Book Tape | | |
| B30-420, 1 ½" wide | $3.00 ea | $2.90 ea. for 6 or more |
| B30-421, 2" wide | $3.99 ea | $3.89 ea. for 6 or more |
| Masking Tape | | |
| B36-305, 1/4" wide | $1.15 ea | $1.10 ea. for 12 or more |
| B36-307, ½" wide | $1.51 ea | $1.45 ea. for 12 or more |

PURCHASE ORDER

| Quantity | Description | Unit Price | Total |
|---|---|---|---|
| 5 | B300591 removable transparent tape, 1" wide | 5.75 | 28.70 |
| 6 | B40-320 book tape, 1 1/2" wide | 2.90 | 17.40 |
| 1 | B30-421 book tape, 2" wide | 3.99 | 3.99 |
| 12 | B36-305 masking tape, 1/8" wide | 1.01 | 13.20 |
| 10 | B36-307 masking tape, 1/2" wide | 1.52 | 15.20 |

# Proofreading
# Skill Sheet 5

**Directions:** For each of the situations described below, tell what type of reference could be used to find the needed information. Some items may have more than one correct answer.

Possible answers include:

- dictionary
- word book (quick reference)
- grammar/style book

1. To check the spelling of a word
dictionary, word book

2. To find out the correct way to use a comma in a sentence that lists several items
grammar/style book

3. To find out how to divide a word at the end of a line
dictionary, word book

4. To find out what a word means
dictionary

5. To find the correct way to use quotation marks
grammar/style book

6. To find another word with the same meaning
dictionary

7. To find out whether a word is an adjective or an adverb
dictionary

8. To find out when to use italics
grammar/style book

9. To decide whether to use a dash or a colon
grammar/style book

10. To find how to spell the plural form of a word
dictionary, grammar/style book

## Proofreading
# Activity Sheet 1

Directions: Use a dictionary, word book, or grammar/style handbook as indicated to answer the following questions.

1. Use a word book (quick reference) for spelling and word division to find the correct way to divide these words.
   Example: difficulty dif·fi·culty
   population pop-u-la-tion
   eventually 'even-tu-ally
   recognizable rec-og-niz-'a-ble
   advantageous advan-ta-geous

2. Use a word book (quick reference) for spelling and word division to correct the spelling of these words.
   Example: difikulty difficulty
   expediant expedient
   refered re'ferred
   conceed concede
   developement development

3. Use a dictionary to find the correct way to spell the plurals of these words.
   Example: difficulty difficulties
   tomato tomatoes
   mother-in-law mothers-in-law
   crisis crises
   alumnus alumni

4. Use a grammar/style handbook to find the information requested.
   What is the abbreviation for "trademark"?
   TM

   What is the abbreviation for "Master of Education"?
   M.Ed.

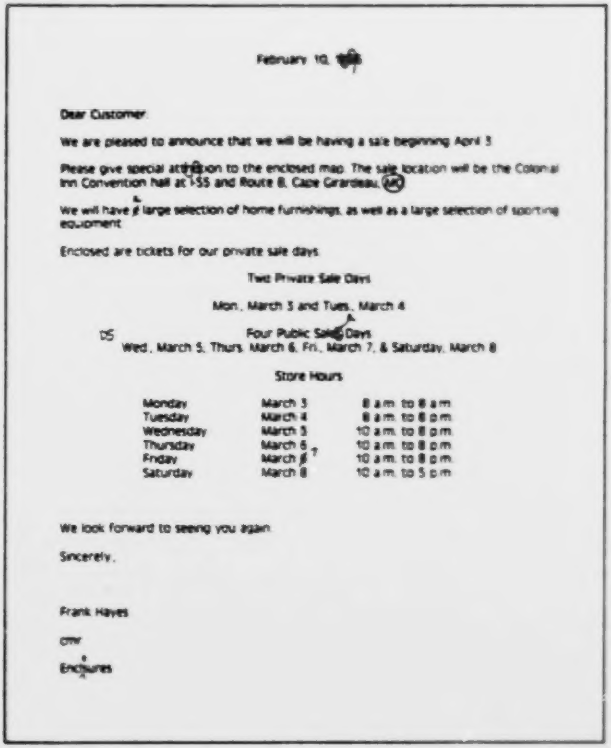
   Are the names of the seasons capitalized?
   no (unless they are personified)

   What is the rule for expressing amounts of money that include mixed amounts of dollars and cents?
   they are shown in figures (numbers), not written out

   How is the possessive of a proper name ending in "s" (for example, Jones) written?
   add apostrophe plus "s" or just an apostrophe,
   for example Jones's or Jones'

# Proofreading
# Skill Sheet 6
## First Reading Key - Blue Ink Pen

11



February 10, [illegible]

Dear Customer:

We are pleased to announce that we will be having a sale beginning April 3.

Please give special attention to the enclosed map. The sale location will be the Colonial Inn Convention hall at I-55 and Route 8, Cape Girardeau, MO

We will have a large selection of home furnishings, as well as a large selection of sporting equipment.

Enclosed are tickets for our private sale days.

Two Private Sale Days

Mon., March 3 and Tues., March 4

DS

Four Public Sale Days
Wed., March 5, Thurs. March 6, Fri., March 7, & Saturday, March 8

Store Hours

| | | |
|---|---|---|
| Monday | March 3 | 8 a.m. to 8 a.m. |
| Tuesday | March 4 | 8 a.m. to 8 p.m. |
| Wednesday | March 5 | 10 a.m. to 8 p.m. |
| Thursday | March 6 | 10 a.m. to 8 p.m. |
| Friday | March 6 7 | 10 a.m. to 8 p.m. |
| Saturday | March 8 | 10 a.m. to 5 p.m. |

We look forward to seeing you again.

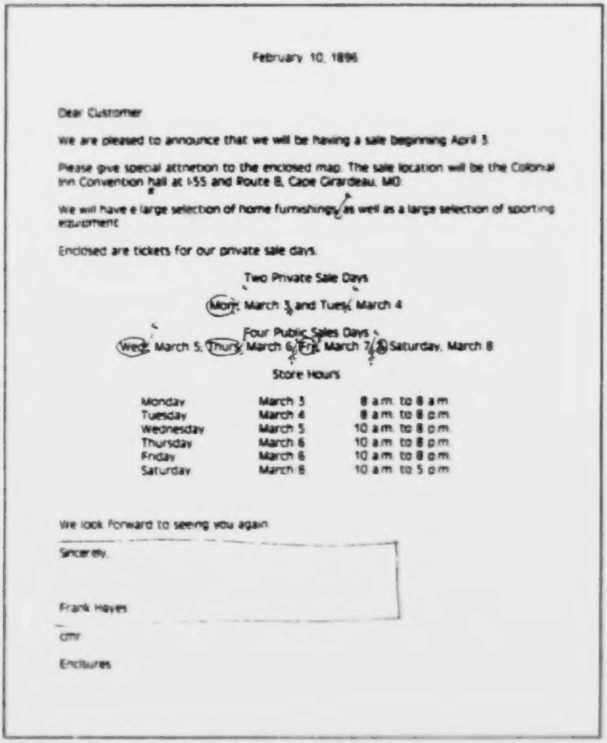
Sincerely,

Frank Hayes

cmr

Enclosures

# Proofreading
# Skill Sheet 6
## Second Reading Key - No. 2 Pencil



February 10, 1896

Dear Customer

We are pleased to announce that we will be having a sale beginning April 3.

Please give special attnetion to the enclosed map. The sale location will be the Colonial Inn Convention hall at I-55 and Route B, Cape Girardeau, MO.

We will have e large selection of home furnishings as well as a large selection of sporting equipment.

Enclosed are tickets for our private sale days.

Two Private Sale Days

Mon. March 3 and Tues. March 4

Four Public Sales Days

Wed. March 5, Thurs. March 6, Fri. March 7, & Saturday, March 8

Store Hours

| | | |
|---|---|---|
| Monday | March 3 | 8 a.m. to 8 a.m. |
| Tuesday | March 4 | 8 a.m. to 8 p.m. |
| Wednesday | March 5 | 10 a.m. to 8 p.m. |
| Thursday | March 6 | 10 a.m. to 8 p.m. |
| Friday | March 6 | 10 a.m. to 8 p.m. |
| Saturday | March 8 | 10 a.m. to 5 p.m. |

We look forward to seeing you again.

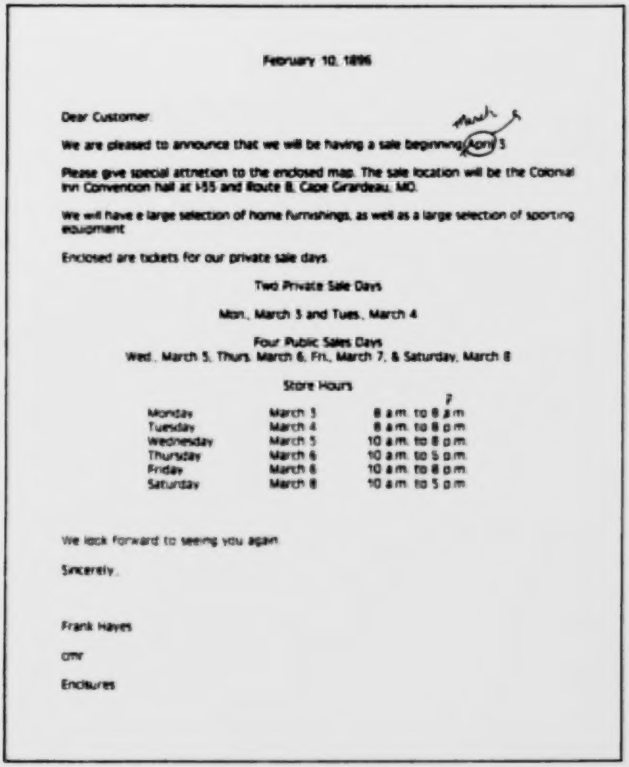
Sincerely,

Frank Hayes

cmr

Enclosures

# Proofreading
# Skill Sheet 6
## Third Reading Key - Black Pen



February 10, 1896

Dear Customer:

March ,
We are pleased to announce that we will be having a sale beginning April 3

Please give special attnetion to the enclosed map. The sale location will be the Colonial Inn Convention hall at I-55 and Route B, Cape Girardeau, MO.

We will have e large selection of home furnishings, as well as a large selection of sporting equipment

Enclosed are tickets for our private sale days.

Two Private Sale Days

Mon., March 3 and Tues., March 4

Four Public Sales Days
Wed., March 5, Thurs. March 6, Fri., March 7, & Saturday, March 8

Store Hours

| | | |
|---|---|---|
| | | p |
| Monday | March 3 | 8 a.m. to 8 a.m. |
| Tuesday | March 4 | 8 a.m. to 8 p.m. |
| Wednesday | March 5 | 10 a.m. to 8 p.m. |
| Thursday | March 6 | 10 a.m. to 5 p.m. |
| Friday | March 6 | 10 a.m. to 8 p.m. |
| Saturday | March 8 | 10 a.m. to 5 p.m. |

We lock forward to seeing you again

Sincerely,

Frank Hayes

cmr

Enclsures

### KEY

## Proofreading

# Unit Review

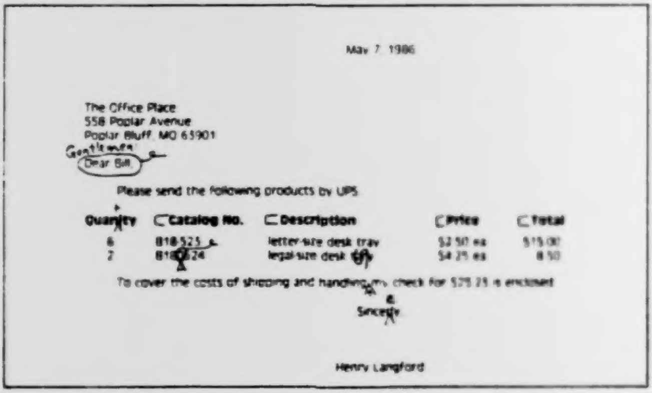
Directions For each symbol in Column 1, choose the correct definition from Column 2. Write the correct letter in the spaces provided.

| | | Column 1 | Column 2 |
|---|---|---|---|
| D | 1 | ○ | A. move to the left |
| A | 2 | ⊏ | B. leave space |
| C | 3 | ℓ | C. delete |
| B | 4 | ^# | D. spell out in full |
| F | 5 | ○→ | E. insert puntuation |
| E | 6 | ^, | F. move circled material to indicated point |

Directions Proofread the following expressions for correct punctuation and symbol usage. If the expressions are correct, enter a "C" in the space provided. If the expressions are incorrect, place proofreaders' marks at the appropriate places.

7 If you are in a hurry, just drop the card in the mail today. C
8 Accordingly, we have updated the ledgers.
9 Therefore, the tickets were printed yesterday. C
10 It has child-proof hinges.
11 Your ideas increased our sales by 20%.
12 You will hear a "beep". C
13 Just call our branch at (314) 552-1441.
14 For as little as $30.00 a day, you can rent a lodge.

Directions Place proofreaders' marks in the following letter.



May 7, 1986

The Office Place
558 Poplar Avenue
Poplar Bluff, MO 63901

Gentlemen
Dear Bill,

Please send the following products by UPS.

| Quantity | Catalog No. | Description | Price | Total |
|---|---|---|---|---|
| 6 | 818-525 | letter-size desk tray | $2.50 ea. | $15.00 |
| 2 | 818-524 | legal-size desk tray | $4.25 ea. | 8.50 |

To cover the costs of shipping and handling, my check for $23.25 is enclosed.

Sincerely,

Henry Langford

# Typing Letters
# Skill Sheet 1

Directions: Study each letter and answer the questions about it.

1 How many words are shown in the first line of the body of Letter B? 9

2 How many lines of handwriting are shown in the body of Letter B? 16

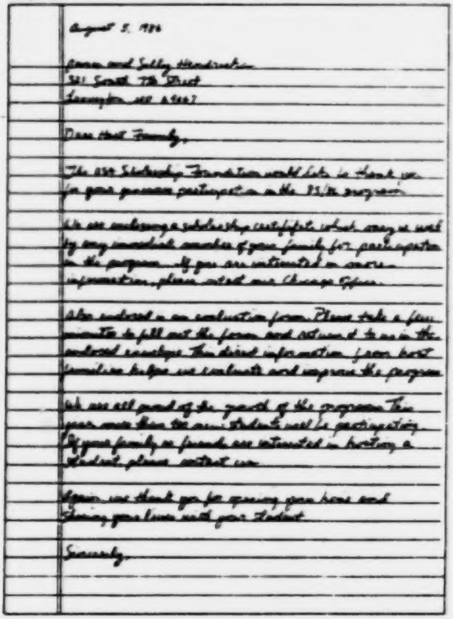
$$\begin{array}{r}16\\ \times 9\\ \hline 144\end{array}$$

3 Multiply the answers from questions 1 and 2 to find the number of words in the body of Letter B 144

4 Margin settings to be used for Letter B are those of ____

a a short letter
[✓ b] an average letter
c a long letter

Letter B



August 5, 1986

[illegible] and Sally Hendricks
321 South 7th Street
[illegible]

Dear Host Family,

The [illegible] Scholarship Foundation would like to thank you
for your generous participation in the [illegible] program.

We are enclosing a scholarship certificate which may be used
by any immediate member of your family for participation
in the program. If you are interested in more
information, please visit our Chicago Office.

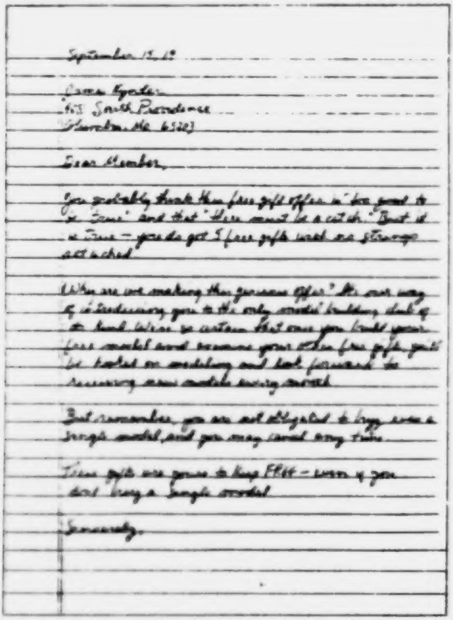
Also enclosed is an evaluation form. Please take a few
minutes to fill out the form and return it to us in the
enclosed envelope. The direct information from host
families helps us evaluate and improve the program.

We are all proud of the growth of the program. This
year more than [illegible] new students will be participating.
If your family or friends are interested in hosting a
student, please contact us.

Again we thank you for opening your home and
sharing your lives with your student.

Sincerely,

Letter C



September 15, 19

[illegible]
153 South Providence
[illegible], Mo 65203

Dear Member,

You probably think this free gift offer is "too good to
be true" and that "there must be a catch." But it
is true — you do get 5 free gifts with no strings
attached.

Why are we making this generous offer? It's our way
of introducing you to the only model building club of
its kind. We're so certain that once you build your
free model and examine your other free gifts you'll
be hooked on modeling and look forward to
receiving new models every month.

But remember, you are not obligated to buy even a
single model, and you may cancel any time.

These gifts are yours to keep FREE — even if you
don't buy a single model.

Sincerely,

5. How many words are shown in the first line of the body of Letter C? 11

6. How many lines of handwriting are shown in the body of Letter C? 14

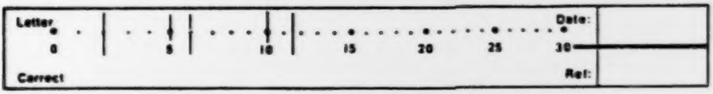
7. Multiply the answers of questions 5 and 6 to find the number of words in the body of Letter C 154

11
×14
44
11
154

8. Margin settings to be used for Letter C are those of b
   - a. a short letter
   - [✓ b.] an average letter
   - c. a long letter

## Typing Letters
# Skill Sheet 2

**Directions**: Study the index strip below and circle the appropriate type of margin setting for each letter.



1. first letter .......... short [✓ average] long
2. second letter .......... short average [✓ long]
3. third letter .......... [✓ short] average long
4. fourth letter .......... short average [✓ long]
5. fifth letter .......... short [✓ average] long

# Typing Letters
## Unit Review

**Directions:** Fill in the blank with the best answer for each question.

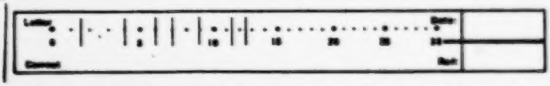
1. The "control" key is a code key. It must be held down while another key is typed.

2. The following word counts were provided on a textbook assignment. Determine whether the letters are short, average, or long by circling the correct length. Fill in the margin settings for those letter lengths in the space provided.

| | | | | 12 PITCH | | 10 PITCH | |
|---|---|---|---|---|---|---|---|
| WORD COUNT | CLASSIFICATION | | | LM | RM | LM | RM |
| 119 | short | [✓ average] | long | 20 | 85 | 17 | 72 |
| 324 | short | average | [✓ long] | 15 | 90 | 12 | 77 |
| 207 | short | [✓ average] | long | 20 | 85 | 17 | 72 |
| 83 | [✓ short] | average | long | 25 | 80 | 22 | 67 |

3. A handwritten letter is 17 lines long. The first line of the body contains 10 words. Is the letter classified as short, [✓ average] or long? (Circle the correct length.)

4. Locate the third piece of correspondence on the following index strip and tell whether the letter is:
   a. short
   [✓ b. average]
   c. long



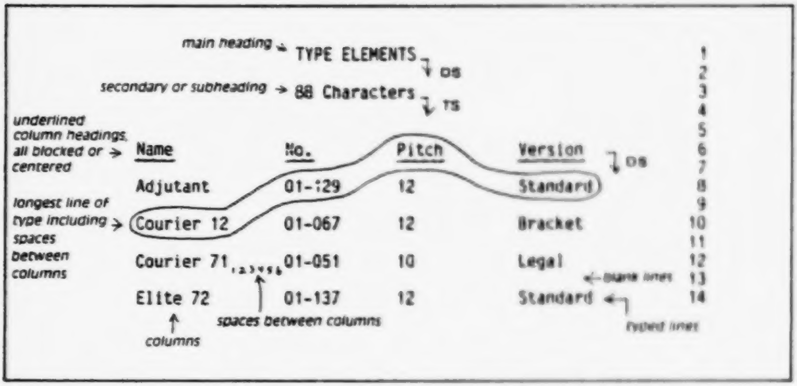
5. You are typing a letter that will be photocopied and mailed to 25 offices. You accidently type paragraph 3, which is a two-line paragraph, where paragraph 2 should be. You are using a typewriter that has a lift off ribbon. Check the correction technique you could use.
   _ cover-up tape
   _ lift off tape
   ✓ lift off ribbon
   ✓ correction fluid
   ✓ correction tape
   _ delete

## Typing Tables
# Skill Sheet 1

To understand instructions for typing tables, knowledge of the names of the parts of tables is necessary. The parts include:

A. main heading
B. secondary or subheading
C. underlined column headings, either all blocked or all centered
D. columns
E. longest line of type including spaces between columns
F. blank lines
G. typed lines
H. spaces between columns (spaces between columns may vary from table to table)

The parts of the following table are labeled and their spacing is indicated.



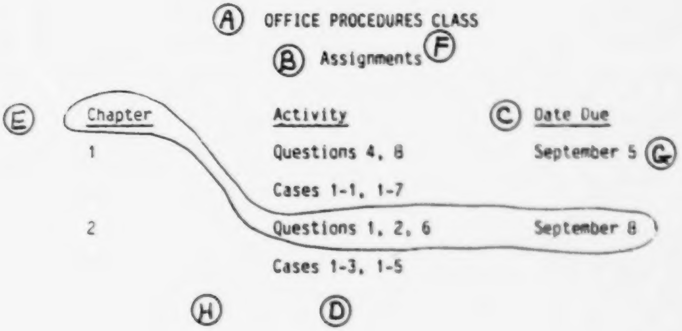
TYPE ELEMENTS

88 Characters

| Name | No. | Pitch | Version |
|---|---|---|---|
| Adjutant | 01-129 | 12 | Standard |
| Courier 12 | 01-067 | 12 | Bracket |
| Courier 71 | 01-051 | 10 | Legal |
| Elite 72 | 01-137 | 12 | Standard |

# Answer Key - Skill Sheet 1

Directions: Using names of the parts of the table as listed on the previous page, labeled A-H, fill in the circles with the appropriate letter.



OFFICE PROCEDURES CLASS

Assignments

| Chapter | Activity | Date Due |
|---|---|---|
| 1 | Questions 4, 8 | September 5 |
| | Cases 1-1, 1-7 | |
| 2 | Questions 1, 2, 6 | September 8 |
| | Cases 1-3, 1-5 | |

Directions: Answer the following questions concerning the table.

1. How many typed lines are in the table? 7
2. How many blank lines are used by the table? 7
3. How many combined lines are used by the table? 14
4. On which line of type would a typist start typing the main heading? 26
   Show math steps.

$$\begin{array}{r} 66 \\ -14 \\ \hline 52 \end{array} \qquad \begin{array}{r} 26 \\ 2\overline{)52} \\ 4 \\ \hline 12 \\ 12 \\ \hline \end{array}$$

# Typing Tables
# Skill Sheet 2

**Directions**: Look at the following table and answer the questions

CALCULATORS

Handheld and Portable

| Brand Name | Catalog No. | Power Service | Printer/Display |
|---|---|---|---|
| Texas Instruments | K9-TI-5008 | AAA Batteries or AC | P/D |
| Texas Instruments | K9-TI-5020 | Solar | D |
| Sharp | K9-El-1161 | AAA Batteries or AC | P/D |
| Sharp | K9-VX-1136 | AA Batteries | D |
| Sharp | K9-EL-345 | Solar | D |
| Adler-Royal | K9-PD1 | Rechargeable Battery | P/D |
| Adler-Royal | K9-PD4 | AA Batteries | P/D |
| Casio | K9-FR-101 | AA Batteries or AC | P/D |
| Casio | K9-SL-3005 | Solar | D |

1. What is the main heading? Calculators
2. What is the longest entry in Column 1? Texas Instruments
3. What is the longest entry in Column 2? Catalog No.
4. What is the longest entry in Column 3? Rechargeable Battery
5. What is the longest entry in Column 4? Printer/Display

---

6. How many strokes are in the longest line of type in the table?
17 +6 11 +6 20 +6 15 = 81

7. What would be the left margin setting for this table? Show math steps. 11

$$\begin{array}{r} 40 \\ 2\overline{)81} \\ \underline{8}\phantom{1} \\ 1 \end{array} \qquad \begin{array}{r} 51 \\ \underline{-40} \\ \boxed{11} \end{array}$$

8. How many lines are needed for this table if it is single spaced? 16

9. On which line of type would a typist start typing the main heading on a full sheet of paper? 26

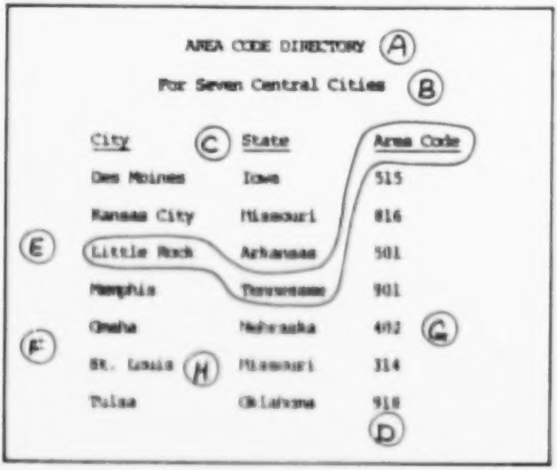
$$\begin{array}{r} 66 \\ \underline{-16} \\ 50 \end{array} \qquad \begin{array}{r} 25 \\ 2\overline{)50} \\ \underline{4}\phantom{0} \\ 10 \\ \underline{10} \end{array} \qquad \begin{array}{r} 25 \\ \underline{+1} \\ \boxed{26} \end{array}$$

10. Type the table in the correct form single spaced.

# Typing Tables
# Unit Review

1. Place the appropriate letters in the circles in this Area Code Directory table

| | |
|---|---|
| A. Main Heading | E. Longest Line of Type |
| B. Subheading | F. Blank Lines |
| C. Column Headings | G. Typed Lines |
| D. Columns | H. Spaces Between Columns |



AREA CODE DIRECTORY

For Seven Central Cities

| City | State | Area Code |
|---|---|---|
| Des Moines | Iowa | 515 |
| Kansas City | Missouri | 816 |
| Little Rock | Arkansas | 501 |
| Memphis | Tennessee | 901 |
| Omaha | Nebraska | 402 |
| St. Louis | Missouri | 314 |
| Tulsa | Oklahoma | 918 |

**Directions:** Circle the correct answer.

2. How many carriage returns should be placed between the main heading and the subheading?
   - a. none
   - b. one
   - [✓ c.] two
   - d. three

Directions: Study the following table and answer the questions concerning it:

IBM COMPATIBLE PRINTWHEELS

For Use With the 6240 Printer
and the 3730 Printer

| Catalog No. | IBM Part No. | Type Style | Pitch |
|---|---|---|---|
| 01-A7501 | - - - - - | Orator 100% | 12 |
| 01-A7504 | 001504086 | Prestige Elite | 12 |
| 01-A7506 | 001506087 | Letter Gothic | 12 |
| 01-A7502 | - - - - - | OCR-B | 00 |
| 01-A7503 | 001503011 | Courier Pica | 10 |
| 01-A7507 | 001507012 | Prestige Pica | 10 |

1. What is the subheading? For Use With the 6240 Printer and the 3730 Printer
2. What is the longest entry in Column 1? Catalog No.
3. What is the longest entry in Column 2? IBM Part No.
4. What is the longest entry in Column 3? Prestige Elite
5. What is the longest entry in Column 4? Pitch
6. How many strokes are in the longest line of the table?
   11 +4+ 12 +4+ 14 +4+ 5 = 54
7. What would be the left margin setting for this table? 34
   Show math steps.
   $2\overline{)54}$ = 27; 4; 14; 14
   51 − 17 = 34
8. On which line of type would a typist start typing the main heading? 24
   Show math steps.
   66 − 19 = 47
   $2\overline{)47}$ = 23; 4; 7; 6; 1
   23 + 1 = 24

## Telephone Techniques
# Activity Sheet 1

Directions: Read the following information and then act out the situations described on the following page.

> Employees who answer the telephone should remember that they represent the company. They should try to create the feeling that they care about each caller. This "caring" attitude will help callers place more confidence in the employees.
>
> Giving each caller your full attention by listening carefully makes callers feel welcome.
>
> A "caring" attitude and good listening skills can be shown over the telephone.

| Courteous Behavior | How Callers Feel |
|---|---|
| 1. Accept the interruption. | Sometimes when calls come, an employee is not in a good mood because of working toward a deadline or simply not feeling well. These moods should not become part of the phone conversation. Try to put a smile on your face for each caller. |
| 2. Answer promptly. | Answering calls within three rings generally indicates a professionally run organization. |
| 3. Use the caller's name. | This makes the caller feel important. |
| 4. Listen patiently. | Sometimes callers may be unhappy about a product. They must get their complaints "off their chest." Although the problem is not your fault, you must not interrupt. |
| 5. Repeat some of the caller's own words. | The caller will feel that you are sympathetic and that you understand the problem. |
| 6. Apologize briefly. | Sometimes the customer feels that a product or service offered by your company is not perfect. The words "I'm sorry" help to sooth the caller's anger. |
| 7. Ask questions. | Show your willingness to help the caller. Ask the caller for dates, amounts, or other information that will help you to fill requests or solve problems. |

Directions: Role play the following situations. Think about how the caller would feel, and demonstrate courteous behaviors listed on the previous page.

SITUATION 1:
You are secretary to Mr. Blue, an accountant who specializes in corporate tax matters. A prospective client calls about personal tax matters. She requests an appointment with Mr. Blue. You know that Mrs. Eastman handles these matters for your firm. You need to transfer the call to Mrs. Eastman's secretary without making the caller feel unwanted.

SITUATION 2:
A customer has gotten home with what she thought was a super combo deluxe deep pan pizza. She finds when she opens the box that it is sausage pizza. She calls to complain. You need to listen to her story, apologize briefly, and keep her good will.

Answers will vary. Student should demonstrate courteous behaviors described on the Activity Sheet.

# Telephone Techniques
# Activity Sheet 2

Only one out of every four business calls reaches its destination on the first attempt because it is difficult for business people to be available at their desks at all times. Therefore, messages are an accepted part of the communication process. Four guidelines for taking telephone messages are:

1. Use a message form. A scrap of paper may get mixed in with other papers or lost entirely. In addition, a scrap of paper does not contain guide words to help you in taking a complete message.
2. Write the message with great care. Avoid rewriting a message as this increases the chance for errors in transposition or omission. Confirm or repeat names, numbers, and messages as you go. You will be sure to hear everything correctly by slowing down the conversation. This allows enough time for you to write legibly.
3. Know company policy. Many companies prefer that carbon copies be kept for the company files. The copies are kept in a spiral-bound book for future reference about names, telephone numbers, or other facts. The original only is torn out and delivered to the party being called.
4. Deliver the message promptly. Place the message in a prearranged place on a desk or on a telephone message holder.

**Directions:** Read the following conversations. Then ask a classmate to play the role of "Caller." Complete message forms for the conversations.

**Exercise 1:**

*You:* *Good morning. Accounting Department. Miss Hutton's desk; Ms Jones speaking.*

*Caller:* *This is Mr. Roberts. Is Miss Hutton in?*

*You:* *I'm sorry, Mr. Roberts, Miss Hutton is not at her desk.*

*Caller:* *Well, can you give her a message?*

*You:* *I'll be happy to. That's Mr. Roberts in the Sales Department, Extension 2288?*

*Caller:* *Right! Tell her that I need to speak to her before noon.*

*You:* *I see, Mr. Roberts. You want her to call before 12.*
*Will she know what the call is about?*

*Caller:* *It's about the Rhoades Construction account.*

*You:* *Yes, Mr. Roberts. Ill ask her to return your call regarding the Rhoades Construction account. Is that spelled R-H-O-A-D-E-S?*

*Caller:* *Correct! Thanks. Goodbye.*

*You:* *Goodbye, Mr. Roberts.*

Exercise 2:

*You:* *Mr. Adams' office. Jennifer Smith speaking.*

*Caller:* *Yes. This is Mr. Montgomery from ABC Corporation. Is Mr. Adams around?*

*You:* *I'm sorry. Mr. Adams is in a conference which should be completed in about a half hour. Can I take a message?*

*Caller:* *All right. Tell him that address he needed is: Allen Belle.*

*You:* *Is that spelled A-L-A-N?*

*Caller:* *No. A-L-L-E-N. B-E-L-L-E.*

*You:* *Belle with an "e" on the end?*

*Caller:* *Right. 2-2-7 Mosely Boulevard.*

*You:* *2-2-7 M-O-*

*Caller:* *...S-E-L-Y.*

*You:* *Okay.*

*Caller:* *Sikeston... Missouri... 63801.*

*You:* *Zip Code 6-3-8-0-1.*

*Caller:* *Right. Thanks.*

*You:* *Thank you, Mr. Montgomery. I'll give Mr. Adams the message.*

*Caller:* *Goodbye.*

*You:* *Goodbye.*

**WHILE YOU WERE OUT**

TO: Miss Hutton

DATE: ______ TIME: ______

BY: Ms Jones

☒ Please return call ☐ Telephoned

☐ Will call again ☐ Returned your call

Name of caller: Mr. Roberts

of: Sales Department

Phone: Extension 2288

Message: Call before 12 noon about the Rhoades Construction account

**WHILE YOU WERE OUT**

TO: Mr. Adams

DATE: ______ TIME: ______

BY: Jennifer Smith

☐ Please return call ☒ Telephoned

☐ Will call again ☐ Returned your call

Name of caller: Mr. Montgomery

of: ABC Corporation

Phone: ______

Message: The address is:
Allen Belle
227 Mosely Boulevard
Sikeston, Missouri 63801

## Telephone Techniques
# Skill Sheet 1

**Directions:** Rewrite the following names giving last name, first name, and middle initial. Spell out all abbreviations.

| | |
|---|---|
| 1. Geo. K. Abscher | Abscher George K. |
| 2. Thos. S. Allen | Allen Thomas S. |
| 3. Jas. L. Alderman | Alderman James L. |
| 4. Chas. O. Baker | Baker Charles O. |
| 5. Edw. R. Barks | Barks Edward R. |
| 6. Wm. S. Barton | Barton William S. |
| 7. Danl. M. Beard | Beard Daniel M. |

**Directions:** Use your local telephone directory to find a telephone number for each of the following situations.

8. A secretary needs to check the prices of desks for her office. What topic should she look under? Possible answers include "office furniture;" "office supply." What guide-words are at the top of the correct page in the directory? Answers will vary. What is the name of one business she could call? Answers will vary. What is the telephone number? Answers will vary.

9. Your employer needs a letter delivered within 24 hours. What topic would you look under in your directory? Possible answers include "delivery service;" "courier." List the names and telephone numbers of at least two businesses which provide such a service.

| BUSINESS | TELEPHONE NUMBER |
|---|---|
| Answers will vary. | Answers will vary. |
| | |

## Telephone Techniques
# Unit Review

Directions: Provide the best answer for each question.

1. An incoming telephone call is indicated by:
   a. a flashing red light
   [✓ b.] a flashing yellow light
   c. a red light
   d. a yellow light

2. What is meant by the phrase "answer promptly"?
   Answer before the third ring

3. Which phrase is a greeting?
   a. "Ivan speaking."
   b. "This is Mrs. Castell speaking."
   [✓ c.] "Good afternoon."

4. Restating and/or spelling names over the telephone is known as:
   [✓ a.] verifying names
   b. confirming data

5. List four of the seven parts of a telephone directory.
   a. inside of the front cover
   b. Customer Guide
   c. white pages
   d. yellow pages
   yellow pages index
   appendix
   inside of the back cover

6. Write the spellings for these abbreviations.
   a. Wm. William
   b. Jos. Joseph
   c. Chas. Charles

7. List three ways that a receptionist can demonstrate that he or she has been listening carefully to the caller.
   a. Use the caller's name.
   b. Repeat some of the caller's own words
   c. Ask questions
   Verify spelling of names
   Confirm dates, amounts and figures
   Confirm agreements

**Clerical/Secretarial Supplementary Units - Answer Key**

**Directions**: Circle the best responses to the following questions.

8. Which names are in correct indexing order?
   - [✓ a.] Farmer E.K.
   - [✓ b.] Faust Machine Company
   - c. William Finch
   - [✓ d.] Screen Arts Incorporated
   - [✓ e.] Schlitt Charles Insurance
   - [✓ f.] Save-A-Lot
   - g. Mrs. Lila Schwab

9. Which of these last names would be found on a page with the guide words "Pruitt-Ramp"?
   - [✓ a.] Quade
   - [✓ b.] Pry
   - [✓ c.] Radiator Service
   - d. Richards
   - [✓ e.] Rader
   - f. Ratliff

10. In your local telephone directory, the telephone number for the park department for your city or county is: Check local directory for answer.

11. Study the conversation below. Assume that you are the secretary. Write a note to yourself that includes all of the information you will need in order to complete the request.

| Secretary | Caller |
|---|---|
| Good morning. Mr. West's office. | This is Mrs. Andrews in the accounting department. May I speak with Mr. West? |
| I'm sorry, Mrs. Andrews, Mr. West is not available now. This is Susan Hall, his secretary. Could I take a message? | Well, no. I really wanted to talk to him about our meeting Thursday afternoon. |
| I see Mrs. Andrews. That's the meeting with the computer consultant. | That's right! Maybe you could help me. I need a copy of the equipment list that the consultant left with Mr. West. |
| Yes, Mrs. Andrews. I was working on that folder just now, and the equipment list is right here. | Good. Can you put a copy of it in the company mail for me today? |
| Of course, Mrs. Andrews. | All right! Thanks, Susan. |
| You're welcome. | Goodbye. |
| Goodbye, Mrs. Andrews. | |

22

**TO:** ____________________
**DATE:** ____________ **TIME:** ____________
**BY:** ____________
☐ Please return call ☐ Telephoned
☐ Will call again ☐ Returned your call
Name of caller Mrs. Andrews
of Accounting Department
Phone ____________________
Message ____________________

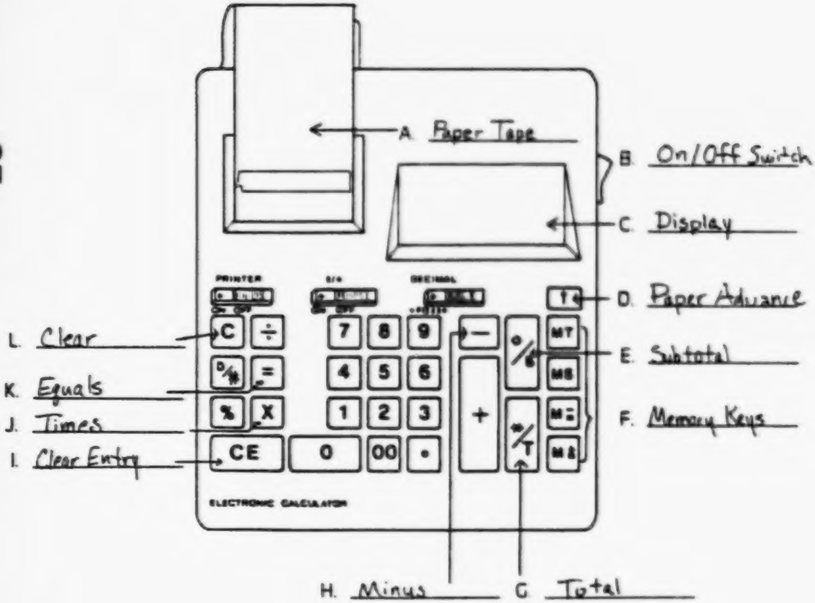
Caller's name: Mrs. Andrews
Caller's department: Accounting Department
Information requested: Equipment list furnished by the computer consultant.
Action requested: Make a photo copy. Put the copy in the company mail today.

## Using Basic Business Math
## Skill Sheet 1

**Directions:** Label the parts of the electronic keyboard below. Choose from these terms:

Paper Tape Display On/Off Switch Paper Advance Memory Keys

Minus Total Clear Clear Entry Equals Times Subtotal



# Using Basic Business Math
## Skill Sheet 2

Directions: Complete the following exercises by using an electronic calculator.

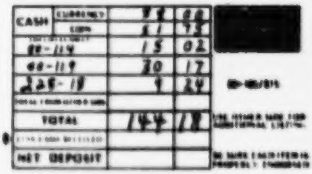
I. Follow the "Steps for Computing Subtotals (ST) and Totals (T) Featuring Addition" to answer these problems.

| | A. | | B. | | C. | | D. |
|---|---|---|---|---|---|---|---|
| | 456 | | 987 | | 789 | | 102 |
| | 852 | | 951 | | 456 | | 100 |
| | 753 | | 963 | | 753 | | 156 |
| ST | 2061 | ST | 2901 | ST | 1998 | ST | 358 |
| | 85,200 | | 345 | | 900 | | 555 |
| | 4,111 | | 300 | | 471 | | 882 |
| | 1,033 | | 989 | | 915 | | 645 |
| T | 92405 | T | 4535 | T | 4284 | T | 2440 |

II. Move the decimal selector to the "2" setting. Read the following problems and enter the answers in the spaces provided.

a. Five items of office supplies are priced at $6, $3.81, $.72, $12.99, and $3.76 respectively. What is the total cost of these items?
$27.28

b. Calculate the amounts shown on the deposit slip and enter the total amount to be deposited.



| | | | |
|---|---|---|---|
| CASH | CURRENCY | 78 | 68 |
| | COIN | 11 | 73 |
| 88-119 | | 15 | 02 |
| 88-119 | | 30 | 17 |
| 225-18 | | 9 | 24 |
| [illegible] | | | |
| TOTAL | | 144 | 18 |
| [illegible] | | | |
| NET DEPOSIT | | | |

## Using Basic Business Math
## Skill Sheet 3

**Directions:** Complete the following exercises by using an electronic calculator.

I. Follow the "Steps for Subtotals and Totals Featuring Subtraction" to compute the answers to these problems.

| A. | B. | C. | D. | E. |
|---|---|---|---|---|
| 1,331.16 | 868.35 | 720.01 | 99.23 | 568.19 |
| −127.22 | −11.42 | −30.00 | −4.25 | −34.86 |
| −158.00 | −20.00 | −20.00 | −30.00 | −2.55 |
| −123.36 | −9.63 | −30.17 | −15.71 | −27.35 |
| 922.58 | 827.30 | 639.84 | 49.27 | 503.43 |

II. Addition and Subtraction. Use the plus function key when entering the balance brought forward and the amount deposited. Use the minus function key to subtract the amount of the check.

| | A. | B. | C. |
|---|---|---|---|
| Balance Brought Forward | 51.34 | 540.50 | 979.00 |
| Amount Deposited | 1,704.31 | 500.00 | 225.00 |
| | ST 1755.65 | ST 1040.50 | ST |
| Amount This Check | 447.66 | 87.53 | 46.30 |
| Balance Carried Forward | 1307.99 | 952.97 | 1157.70 |

| | D. |
|---|---|
| Balance Brought Forward | 616.23 |
| Amount Deposited | 2,380.65 |
| | ST 2996.88 |
| Amount This Check | 38.27 |
| Balance Carried Forward | 2958.61 |

# Using Basic Business Math
## Skill Sheet 4

Directions: Follow the "Steps for Computing Subtotals and Totals Featuring Multiplication" to compute the answers to these problems. Multiply the amount in the "Quantity" column times the "Unit Price." The subtotals should be entered in the column marked "Extension." Enter the Memory Total in the area marked "Invoice Total."

A.

| Quantity | Catalog No. | Description | Unit Price | Extension |
|---|---|---|---|---|
| 1 | 3 B 59301 | Integrt'd Phone System | 169.99 | 169.99 |
| 12 | 3 B 5984 | Outgoing Tape | 4.99 | 59.88 |
| 6 | 3 B 5981 | Incoming Tape | 4.99 | 29.94 |
| | | | Invoice Total | 259.81 |

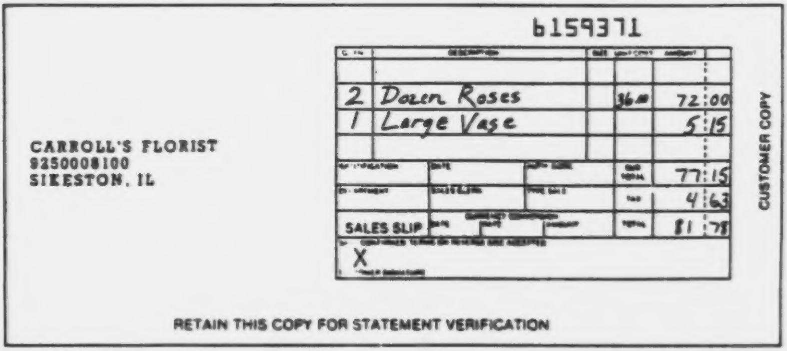
24

B.

| Quantity | Catalog No. | Description | Unit Price | Extension |
|---|---|---|---|---|
| 3 | 9 B 83633 | Surge Suppressor | 39.99 | 119.97 |
| 2 | 9 B 83193 | Security Switch | 24.99 | 49.98 |
| 2 | 9 B 83194 | Wall Outlet Sensor Timer | 12.99 | 25.98 |
| | | | Invoice Total | 195.93 |

## Using Basic Business Math
# Skill Sheet 5

**Directions:** Complete the following charge slips by adding the charges. Subtract any discounts. Then, multiply the subtotal by 6 percent, the combined tax rate for the city and state.



b159371

**CARROLL'S FLORIST**
**9250008100**
**SIKESTON, IL**

| | | | | | |
|---|---|---|---|---|---|
| | | | | | |
| 2 | Dozen Roses | | 36.00 | 72 | 00 |
| 1 | Large Vase | | | 5 | 15 |
| | | | | | |
| | | | | 77 | 15 |
| | | | | 4 | 63 |
| SALES SLIP | | | | 81 | 78 |

X

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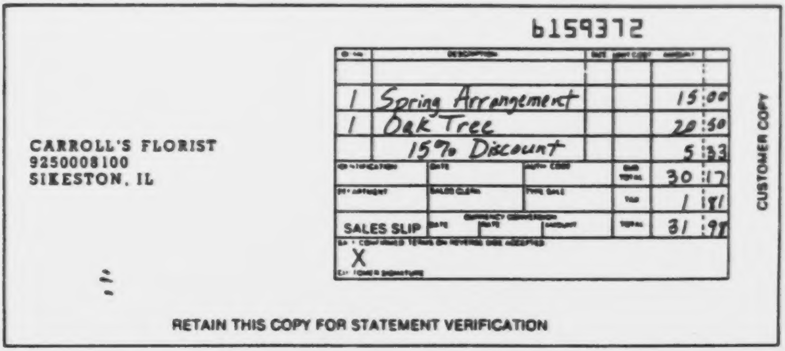

b159372

**CARROLL'S FLORIST**
**9250008100**
**SIKESTON, IL**

| | | | | | |
|---|---|---|---|---|---|
| | | | | | |
| 1 | Spring Arrangement | | | 15 | 00 |
| 1 | Oak Tree | | | 20 | 50 |
| | 15% Discount | | | 5 | 33 |
| | | | | 30 | 17 |
| | | | | 1 | 81 |
| SALES SLIP | | | | 31 | 98 |

X

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## Using Basic Business Math
# Unit Review

Directions: Use an electronic calculator to solve the following problems.

| 1. | | | | |
|---|---|---|---|---|
| | Add: | 789<br>741<br>753 | 555<br>777<br>747 | 123<br>456<br>987 |
| | Subtotal: | 2283 | 2079 | 1566 |
| | Add: | 252 | 996 | 410 |
| | Total: | 2535 | 3075 | 1976 |

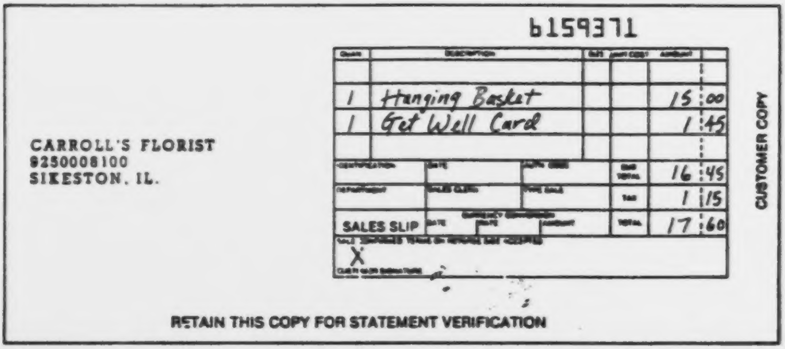
| 2. | | | | |
|---|---|---|---|---|
| | | 235<br>−103 | 787<br>−417 | 1.001.00<br>−951.45 |
| | Subtotal: | 132 | 370 | 49.55 |
| | Subtract: | −14 | −166 | −5.67 |
| | Total: | 118 | 204 | 43.88 |

3. 12 x 3.99
20 x 5.99 167.68

4. $108.98 x 30% 32.69
$239.98 x 20% 48.00

5. An item costing $27.98 is on sale for 30% less. What is the sale price?
$19.59

6. Determine the "Total" of the following charge slip. The tax rate for this city is 7 percent.



CARROLL'S FLORIST
9250008100
SIKESTON, IL.

b159371

| | | | | |
|---|---|---|---|---|
| 1 | Hanging Basket | | | 15.00 |
| 1 | Get Well Card | | | 1.45 |
| | | | | 16.45 |
| | | | | 1.15 |
| SALES SLIP | | | | 17.60 |

X

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# Banking
# Skill Sheet 1

**Directions**: Read through the following information on making change and solve the problems listed at the bottom of the page.

Making change has been simplified by cash registers that calculate the amount of change that should be given to the customer. In order to do this, the cashier enters the amount of money offered by the customer and subtracts the amount the customer owes. The cashier then proceeds to count out the amount of change by starting with the largest denomination of currency and coins available and working toward the smallest.

Whenever an authorized office worker needs to give out money from the petty cash box, the process is similar. Two examples of making change are presented here.

1. The sales manager gives you a receipt for the printing of advertising flyers. This means that he has paid the printers, and he needs to be reimbursed for this company expense. The amount of the receipt is $14.89. The sales manager should be given one ten-dollar bill, four one-dollar bills, three quarters, one dime, and four pennies. ($10 plus $4 plus $.75 plus $.10 plus $.04 equals $14.89.)

The following form may be helpful:

| Change Needed | $20 | $10 | $5 | $1 | .25 | .10 | .05 | .01 |
|---|---|---|---|---|---|---|---|---|
| 1. $14.89 | | 1 | | 4 | 3 | 1 | | 4 |
| 2. 6.50 | | | 1 | 1 | 2 | | | |
| 3. 8.45 | | | 1 | 3 | 1 | 2 | | |
| 4. 21.43 | 1 | | | 1 | 1 | 1 | 1 | 3 |
| 5. 13.54 | | 1 | | 3 | 2 | | | 4 |

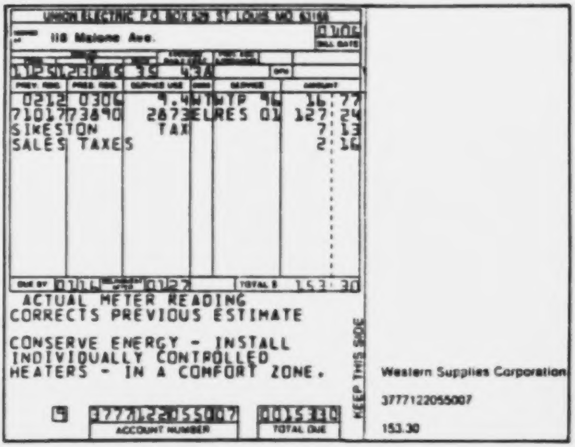
2. The newspaper girl brings in today's paper. It is also time to pay for the monthly subscription. The cost of the subscription is $6.50. The newspaper girl should be given one five-dollar bill, one one-dollar bill, and two quarters.

**Problems**: Fill in the form provided above (lines 3 - 5) with the denominations and coins that would add up to these amounts: $8.45, $21.43, and $13.54.

# Banking
# Unit Review

Directions: Answer the following questions using the blanks or forms provided.

1. Study the bill shown here and enter the data requested.



UNION ELECTRIC P.O. BOX 529 ST. LOUIS MO 63166

118 Malone Ave.

01 06
BILL DATE

| PREV. RDG. | PRES. RDG. | SERVICE USE | | SERVICE | AMOUNT |
|---|---|---|---|---|---|
| 0212 | 0306 | 9.4 | WT | WTP 96 | 16 77 |
| 71017 | 73890 | 2873 | EL | RES 01 | 127 24 |
| SIKESTON | | TAX | | | 7 13 |
| SALES | TAXES | | | | 2 16 |

DUE BY 01 16 … 01 27 TOTAL $ 153 30

ACTUAL METER READING
CORRECTS PREVIOUS ESTIMATE

CONSERVE ENERGY - INSTALL
INDIVIDUALLY CONTROLLED
HEATERS - IN A COMFORT ZONE.

3777122055007
ACCOUNT NUMBER

00015330
TOTAL DUE

KEEP THIS SIDE

Western Supplies Corporation
3777122055007
153.30

a. The due date is: 01-16

b. The minimum payment due is: $153.30

c. The account number is: 3777122055007

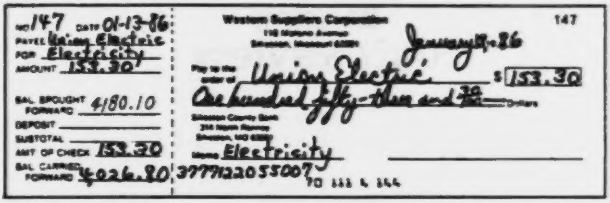
d. The billing date is: 01-06

2. Prepare a tickler card for the bill in Question 1.

Prepare check to Union
Electric

SEE: Utility Bills

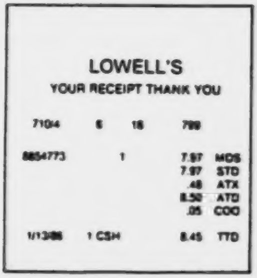
3. Prepare the check stub and check for the bill in Question 1. Use check Number 147 and January 13 as the date.



NO 147 DATE 01-13-86
PAYEE Union Electric
FOR Electricity
AMOUNT 153.30
BAL. BROUGHT FORWARD 4180.10
DEPOSIT
SUBTOTAL
AMT OF CHECK 153.30
BAL. CARRIED FORWARD 4026.80

Western Suppliers Corporation
147
January 13 86
Pay to the order of Union Electric $ 153.30
One hundred fifty-three and 30/100 Dollars
Memo Electricity
3777122055007
70 333 & 344

4. The following receipt was presented by Ms. Western for a new diskette file.
   a. Prepare the petty cash voucher. Use No. 122 and January 13 as the date. . The account number is 3109.

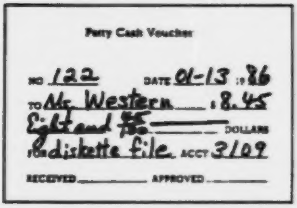


LOWELL'S
YOUR RECEIPT THANK YOU

```
7104        6     16      789

8854773           1       7.97   MDS
                          7.97   STD
                           .48   ATX
                          8.50   ATD
                           .05   COO

1/13/86     1 CSH         8.45   TTD
```



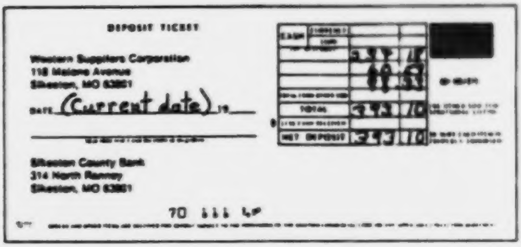
Petty Cash Voucher

NO 122 DATE 01-13 19 86
TO Ms. Western $ 8.45
Eight and 45/100 DOLLARS
FOR diskette file ACCT 3109
RECEIVED ________ APPROVED ________

   b. Indicate how the change would be prepared.

How many $10s? 0
$5s? 1
$1s? 3
quarters? 1
dimes? 2
nickels? 0
pennies? 0

5 In today's mail, you receive three checks. Prepare a deposit slip. The checks are for $234.18, $60.59, and $98.33.



DEPOSIT TICKET

Western Suppliers Corporation
118 Malone Avenue
Sikeston, MO 63801

DATE (Current date) 19__

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

| | | | |
|---|---|---|---|
| CASH | | | |
| | | | |
| | | 234 | 18 |
| | | 60 | 59 |
| | | 98 | 33 |
| | | | |
| TOTAL | | 393 | 10 |
| | | | |
| NET DEPOSIT | | 393 | 10 |

[redacted]

70 111 4P

## Incoming Mail
# Skill Sheet 1

**Directions:** Answer the following questions.

1. The postmark on the envelope is October 10. The date on the letter is October 10. Would you attach the envelope to the letter? ☐ YES ☒ NO

2. The postmark on the envelope is October 10. A Bill of Sale accompanies the letter. Would you attach the envelope to the letter? ☐ YES ☒ NO

3. The typist does not type the signer's name, but the signer signs the letter anyway. Would you attach the envelope to the letter? ☒ YES ☐ NO

4. The writer types the letter on plain paper and forgets to type the home address. Would you attach the envelope to the letter? ☒ YES ☐ NO

5. The sender forgets to send the enclosure. Would you attach the envelope to the letter? ☒ YES ☐ NO

6. The sender forgets to sign the letter which is dated October 10. The envelope is postmarked October 17. Would you attach the envelope to the letter? ☒ YES ☐ NO

7. The sender includes a Lease Agreement with the letter typed on plain paper. The sender's name is not typed on the letter. Would you attach the envelope to the letter? ☒ YES ☐ NO

8. The letter mentions a shipment to be sent. Would you register the letter? ☒ YES ☐ NO

9. The correspondence is a telegram. Would you register the telegram? ☒ YES ☐ NO

10. The memo mentions an attached report, but the report is not in the manila envelope. Would you register the correspondence? ☒ YES ☐ NO

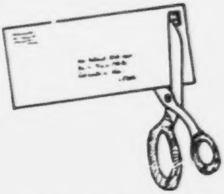
11. The package is sent by Insured Mail. Would you register the package? ☒ YES ☐ NO

## Incoming Mail
# Unit Review

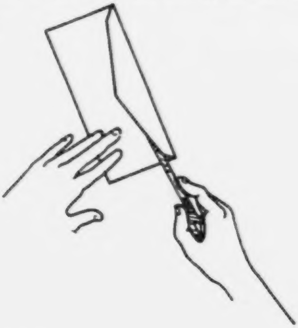
Directions: Circle the best answer for questions 1 through 5.

1. Which example shows the correct way to open business correspondence?

a



[✓ b.]



2. An example of a mailing notation is:
   - [✓ a] "Registered"
   - b "Postmark"
   - c "Return Address"

3. The enclosure notation is typed in this location:
   - a between the date and address
   - [✓ b] below the reference initials
   - c in the upper left corner of the envelope

4. Small enclosures are attached to correspondence
   - [✓ a] by clipping them to the front of the letter
   - b by stapling them to the bottom of the letter
   - c by stapling them to the back of the letter

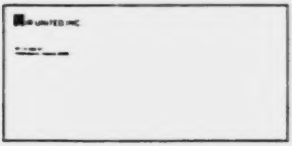
5. Which of the following examples does NOT need to be noted in a mail register?
   - [✓ a] a letter sent by First-Class Mail
   - b a letter sent by Insured Mail
   - c a letter which indicated that a catalog was being sent
   - d a letter which indicated an enclosure but the enclosure was not found

6. List two examples of incoming mail that would be placed in a folder labeled "Correspondence."
   a letters
   b memos
   bills

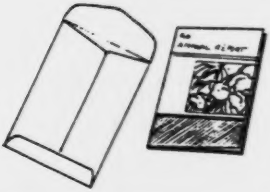
## Outgoing Mail
# Skill Sheet 1

**Directions:** After studying the different types of envelopes shown here, answer the practice problems that follow.

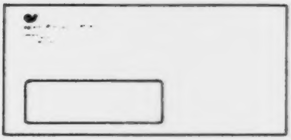
1. General correspondence is usually mailed in No. 10 Envelopes.



2. Use manila envelopes for correspondence which should not be folded.



3. Window envelopes may be used with general correspondence, statements, or business forms.



4. No. 6¾ envelopes may be used with paper which is less than 6½ inches across. General correspondence may also be sent in these envelopes.

5. "Advertising mail" is mailed in envelopes which have been imprinted with the bulk rate emblem.

BULK RATE
US POSTAGE
PAID
Company's Name
Permit No.

Directions: Write the correct letter in the space provided. The answers may be used more than once. Some questions may have more than one answer.

B 1. A letter and 20-page report should be mailed in this envelope.

A, C, D 2. A letter typed on 8"x11½" stationery would be mailed in this envelope.

E 3. Advertising literature mailed to 300 customers

A, C, D 4. Monthly statements sent out by a florist's shop

A, C 5. A purchase order

B 6. A 5"x 7" photograph

A. No. 10 envelope

B. manilla envelope

C. window envelope

D. No. 6¾ envelope

E. bulk rate envelope

# Outgoing Mail
# Skill Sheet 2

**Directions:** After studying a postage scale and the postal chart shown here, circle the best response for the practice problems below. (You will need postage scales to answer questions 1, 3, and 5.)

First-Class Rates* for Pieces Not Exceeding Ounces Indicated

| | |
|---|---|
| 1 ounce | $0.22 |
| 2 ounces | 0.39 |
| 3 ounces | 0.56 |
| 4 ounces | 0.73 |
| 5 ounces | 0.90 |
| 6 ounces | 1.07 |
| 7 ounces | 1.24 |

Problems:

1. What is the weight of a No. 10 envelope and five sheets of paper?
   [✓ a. not more than one ounce]
   b. between one and two ounces
   c. not more than three ounces

2. What is the correct postage for the envelope described and its contents?
   [✓ a. $0.22]
   b. $0.39
   c. $0.56

3. What is the weight of a 9"x 12" manila envelope and six sheets of paper?
   a. not more than one ounce
   [✓ b. between one and two ounces]
   c. between two and three ounces

4. What is the correct postage for the envelope describe and its contents?
   [✓ a. $0.39]
   b. $0.56
   c. $0.73

5. What is the weight of a 9"x 12" manila envelope and 20 sheets of paper?
   a. not more than one ounce
   b. between one and two ounces
   c. between two and three ounces
   [✓ d. between three and four ounces]

6. What is the correct postage for the envelope described and its contents?
   a. $0.22
   b. $0.39
   c. $0.56
   [✓ d. $0.73]

---

*The first ounce costs 22 cents. Each additional ounce costs 17 additional cents. For pieces over 12 ounces, see postal brochures on First-Class Zone Rated (Priority) Mail rates.

## Outgoing Mail
# Skill Sheet 3

Directions: Locate the Zip Codes for the following addresses of branch offices of the Adams Corporation.

1. Adams Corporation
   79 Westerly Avenue
   Bethel, ME 04217

2. Adams Corporation
   19 Adams Boulevard
   Barker, TX 77413

3. Adams Corporation
   2702 Braemore Road
   Columbia, MO 65201

4. Adams Corporation
   4710 Whitney Drive
   Fayetteville, NC 28302

5. Adams Corporation
   147 North Main Street
   Sioux Falls, SD 57102

6. Adams Corporation
   707 Market Street
   St. Louis, MO 63101

7. Adams Corporation
   302 North Linn Street
   Garden City, RI 02920

8. Adams Corporation
   270 East Parker Road
   Sunnyside, WA 98944

# Outgoing Mail
# Unit Review

**Directions**: Circle the letter showing the best answer for each question.

1. An invoice should NOT be mailed in this kind of envelope.
   a. No. 10 envelope
   b. manila envelope
   c. window envelope
   [✓ d.] bulk rate envelope

2. Bulk mail is an example of:
   a. First-Class Mail
   b. Second-Class Mail
   [✓ c.] Third-Class Mail
   d. Fourth-Class Mail

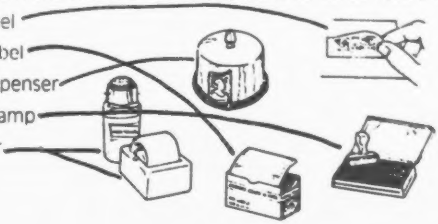
3. An enclosure notation is your clue for:
   a. affixing extra postage
   [✓ b.] attaching enclosures to the correspondence
   c. photocopying an extra copy

4. Use a zip code directory to find zip codes for the following cities.
   a. Sweet Water, IL 62687
   b. Box Number 5001, Portland, ME 04101
   c. Hatton, VA 24560

5. Correctly fold the letter on the next page and insert it into a No. 10 envelope.

6. Weigh a No. 10 envelope and four sheets of paper. Answer the following questions.
   a. What is the total weight in ounces? Not more than one ounce
   b. How much First-Class Mail postage would be affixed to the envelope? 22¢

7. Draw a line from the name of the equipment to its correct picture.
   a. meter label
   b. mailing label
   c. stamp dispenser
   d. rubber stamp
   e. moistener



Mountain Plains Chemicals, Inc.
334 Jefferson Street
Reeds Spring, MO 65737

August 22, 1986

Mrs. Jennifere Collins
123 Wendle Lane
Reed Springs, MO 65737

Dear Mrs. Collins:

Your request for a charge account at Mountain Plains Chemicals, inc., is very much appreciated.

Your request is being reviewed. However, we need your help. Please supply the following:

____ Application was incomplete. Please supply the data indicated.

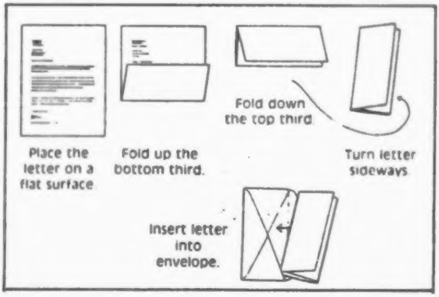
____ Application was incomplete. Please sign the application as indicated.

____ Please provide the names and addresses of two references.

Your application will be processed as quickly as possible. In the meantime, Mrs. Collins, you may be interested in our end-of-the-month specials on supplies for your swimming pool. In addition, bring this letter with you between the 25th and the 30th of this month for a 10 percent discount.

Sincerely,

Fold the correspondence and insert it into the No 10 envelope following the example shown here


Place the letter on a flat surface
Fold up the bottom third.
Fold down the top third.
Turn letter sideways.
Insert letter into envelope.

You have planned your workday as illustrated by the sample calendar shown here.

**Daily Calendar** **March 10**

| | |
|---|---|
| 8:00 | Check desk calendar for any deliveries that need to be made |
| 8:15 | |
| 8:30 | Make deliveries |
| 8:45 | |
| 9:00 | |
| 9:15 | Open incoming mail for the department |
| 9:30 | Process purchase requests |
| 9:45 | |
| 10:00 | |
| 10:15 | |
| 10:30 | Break |
| 10:45 | Assign code numbers to new materials |
| 11:00 | |
| 11:15 | Prepare notice to offices about new materials |
| 11:30 | |
| 11:45 | |
| 12:00 | |
| 12:15 | Lunch |
| 12:30 | |
| 12:45 | |
| 1:00 | |
| 1:15 | Make afternoon deliveries, if needed |
| 1:30 | |
| 1:45 | Open incoming mail for the department |
| 2:00 | Process purchase requests |
| 2:15 | |
| 2:30 | |
| 2:45 | |
| 3:00 | |
| 3:15 | Break |
| 3:30 | Process outgoing mail |
| 3:45 | |
| 4:00 | Update computer list or do filing |
| 4:15 | |
| 4:30 | |
| 4:45 | |

Questions:

1. What tasks are performed by this person each day? deliveries, opening incoming mail, processing purchase orders, assigning code numbers, preparing notices, processing outgoing mail, updating computer lists.

2. Which tasks require the most attention and energy? processing purchase requests, assigning code numbers, updating computer lists.

# Decision Making and Organizing Work
## Skill Sheet 2

Directions: Reread the job description given on Skill Sheet 1. Solve the cases given below using the Five-Step Approach.

**Case A:** You receive a telephone request for a video taping session this afternoon at 2. The technician is attending a training seminar and will not be back until 3:30.

Problem: The technician won't be back in time for a 2 p.m. taping.
Facts: The studio equipment is already set up. The technician is the only one authorized to use the equipment.
Alternatives: Offer to tape the session yourself.
Suggest a different time.
Best Solution: Suggest a different time.
How the Solution Will Be Implemented: Convince the caller that he/she will benefit by having a trained technician on hand to assist with a better taping session thus saving the caller time and effort.

**Case B:** Your supervisor is away for two days for an out-of-town meeting. You receive a "rush" request for a film which costs $185.

Problem: The price of the film exceeds the limit for which you are to process a purchase order without prior approval.
Facts: Your supervisor is away for two days for a meeting. The request is marked "rush."
Alternatives: Process a purchase order to rent the film.
Process a purchase order to buy the film.
Call the office and say there will be a delay.
Best Solution: Process a purchase order to rent the film.
How the Solution Will Be Implemented: Send a notice explaining why the film requested has been ordered on a rental basis.

## Answer Key

## Decision Making and Organizing Work
## Skill Sheet 3

Case A: (Answers will vary.)

| | |
|---|---|
| Problem: | How do you fit the request into the schedule? |
| Facts: | This is a "can wait" task.<br>You estimate that the time required will be between 1 to 2 hours. |
| Alternatives: | Block out 30 minutes on your calendar over the next three days to work on inventory.<br>Skip some of the daily items to get this project over with. |
| Best Solution: | First alternative (Block out 30 minutes...) |
| Implement: | Write in the project on your desk calendar. |
| Priority: | 4 |

Case B: (Answers will vary.)

| | |
|---|---|
| Problem: | Which request should be taken care of first. |
| Facts: | The telephone call should be made right away since the taping session is scheduled for tomorrow morning; it is a "1" priority.<br>The computer run can be done later while you are doing some other task, such as updating the computer listings; it is a "2" priority. |
| Alternatives: | Make the call first.<br>Print the run first. |
| Best Solution: | Make the call first. |
| Implement: | Make the call.<br>Print the run while you are working on the daily item of updating the computer listings. |

Priority of Rescheduling the Taping Session: 1

Priority of Running the Computer Printout: 2

# Decision Making and Organizing Work
# Unit Review

1. List two suggestions for being organized.

a. be familiar with the procedures manual / c. organize workspace
b. be familiar with the work flow. / d. plan the workday.

2. List the categories for prioritizing tasks.

a. rush items
b. projects / assignments
c. daily items
d. can wait items

3. List the five problem-solving steps.

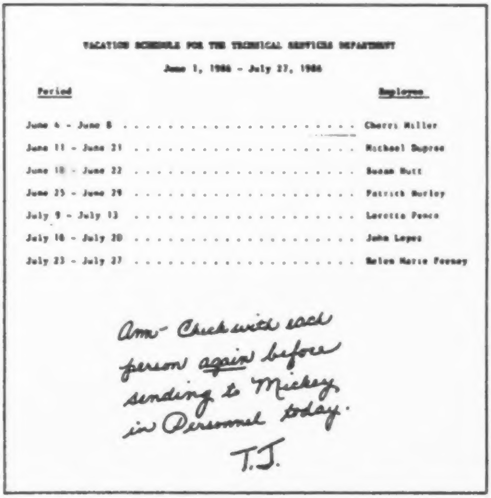
a. identify the problem
b. identify the facts
c. identify alternative solutions
d. select the best solution
e. implement the solution

4. Using the job description from Information Sheet 1 to help you decide if the following tasks are 1, 2, 3, or 4 in priority. Assume today's date is May 14.

36

A. 1
B. 4
C. 4
D. 3
E. 3 or 1

A



VACATION SCHEDULE FOR THE TECHNICAL SERVICES DEPARTMENT

June 1, 1984 - July 27, 1984

| Period | Employee |
|---|---|
| June 4 - June 8 | Cherri Miller |
| June 11 - June 21 | Michael Dupree |
| June 18 - June 22 | Susan Hutt |
| June 25 - June 29 | Patrick Hurley |
| July 9 - July 13 | Loretta Pence |
| July 16 - July 20 | John Lopez |
| July 23 - July 27 | Helen Marie Feeney |

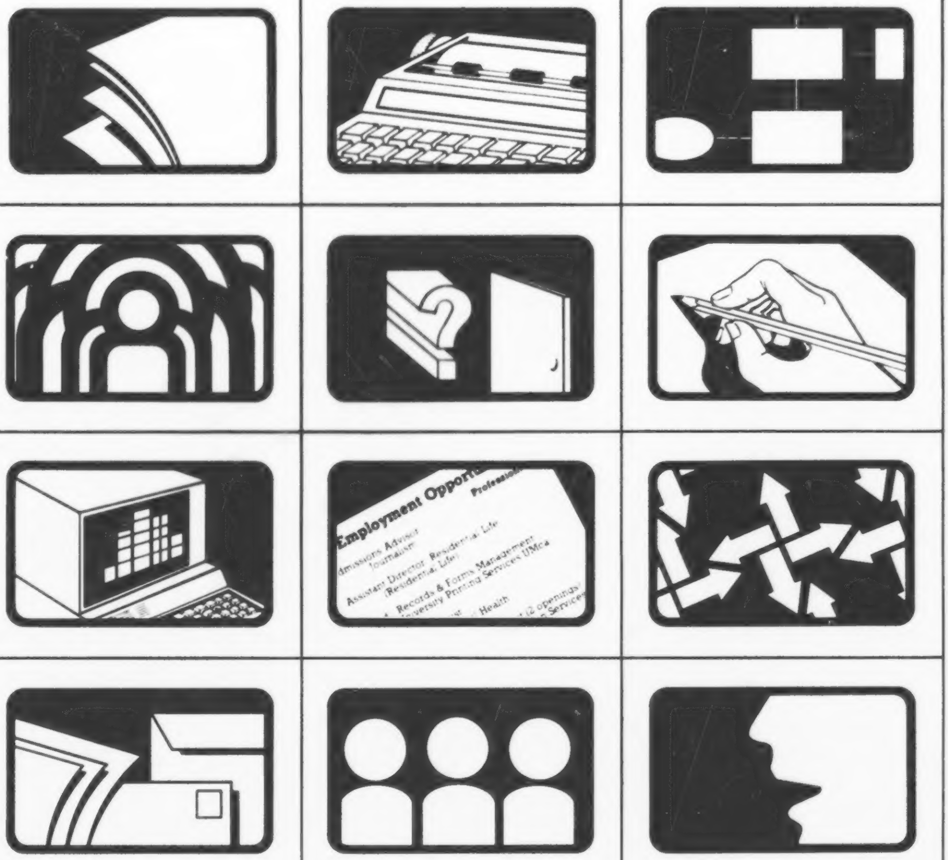
Ann- Check with each
person again before
sending to Mickey
in Personnel today.
T.J.

SN-92-S

SUPPLEMENTARY UNITS FOR
SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

# Job Keeping

Unit 1



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## Job Keeping
# Introduction

Getting your first clerical/secretarial job will depend upon factors such as educational preparation, the business skills you have learned, and your interviewing skills. **Keeping** this job will depend upon your personal traits, business skills, and ability to maintain relationships with customers, co-workers, and employers. This unit presents strategies for getting along with bosses and co-workers as well as providing for advancement into higher positions.

---

## Unit Objective

After completion of this unit, you should be able to summarize your individual strengths for a job, demonstrate good interpersonal skills, and establish a self-development plan for advancement.

## Specific Objectives

After completion of this unit, you should be able to:

1. Identify business skills and personal traits needed for employment.
2. Demonstrate good interpersonal skills.
3. Plan for advancement.

---

## Are You Ready?

Check the statement which is true for you.

☐ I want to study the information in this unit before doing the Performance Checklist.

**TURN TO NEXT PAGE AND BEGIN**

☐ I can do the above tasks and I am ready to do the Performance Checklist.

**SEE YOUR INSTRUCTOR**

## A. Terms and Equipment for Job Keeping

### Terms

1. Advancement - preparing for and moving into higher level positions.
2. Business skills - ability to perform tasks needed in a clerical or secretarial job.
3. Interpersonal skills - getting along with other people.
4. Networking - using contacts with other people to advance in your work or to find higher level positions.
5. Personal traits - personality characteristics.

## B. Identifying Business Skills Needed for Employment in Clerical/Secretarial Positions

A survey of newspaper ads showed many business skills which employers were looking for in their new employees. The guidelines below describe skills needed in many entry-level clerical or secretarial postions.

1. Be able to type.

2. Be able to transcribe shorthand and/or machine dictation.

3. Follow office procedures.

4. Use correct grammar and spelling.

February 6, 1986

Mr. Bill Lowe
6025 West End Boulevard
Springfield, MO 65802

Dear Mr. Lowe:

We are happy to inform you that your stock in o
substantial dividend this fiscal period. You w
enclosed.

Now is the right time to consider investing mo
Air United earned a larger net income this pas
history. Next year is expected to be even bet

We appreciate your interest in our organizati
having you as a major stockholder in the many

Sincerely yours

NITED, INC

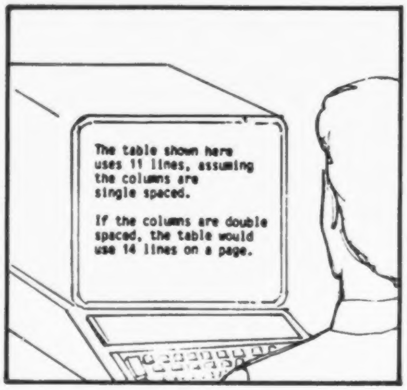
5. Have courteous telephone skills.

6. Be able to file.

7. Perform data entry tasks.

8. Keep accurate records.

9. Perform word processing tasks.

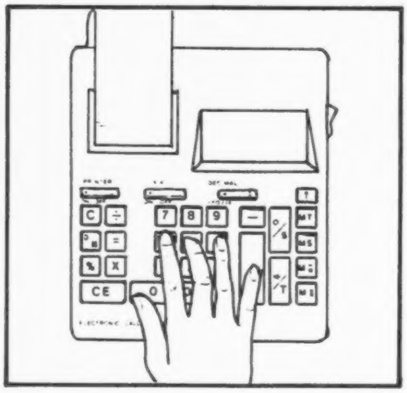

The table shown here uses 11 lines, assuming the columns are single spaced.
If the columns are double spaced, the table would use 14 lines on a page.

10. Greet the public.

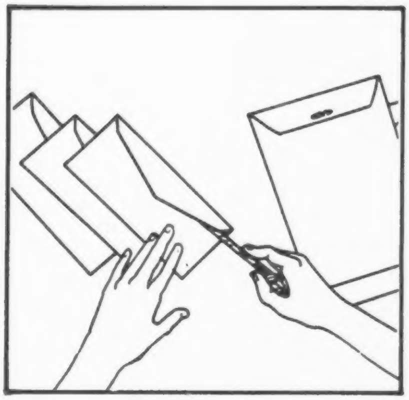
"Hello Mr. and Mrs. Stephens. Mr. Hewitt can see you now."

11. Process business forms.

12. Use an electronic calculator.



13. Process mail.



14. Proofread.

PROOFREADERS' MARKS
Correction or Change Marked in Text
If you are interested ^ we
on the pay roll
Mutual life of New York
two or more lines. ¶ One
caution
centered over the
columns and then typed

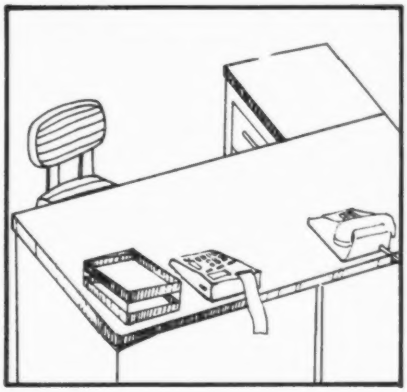
15. Communicate with customers, co-workers, and employers.

16. Have good interpersonal skills.

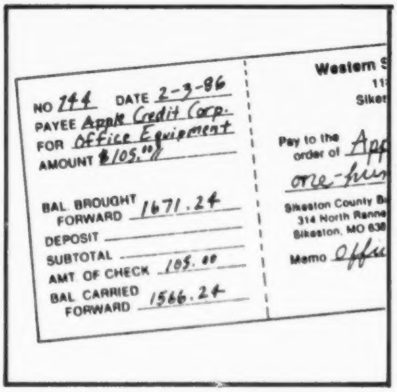
## C. Identifying Desirable Personal Traits for Clerical/Secretarial Employees

Employers often state that employees most often lose their jobs due to absenteeism, tardiness, and their inability to get along with other workers. Employers usually look for **and keep** employees who follow the following guidelines in their jobs.

1. Be neat.



2. Be accurate.



NO 144 DATE 2-3-86
PAYEE Apple Credit Corp.
FOR Office Equipment
AMOUNT $105.00/
BAL. BROUGHT FORWARD 1671.24
DEPOSIT
SUBTOTAL
AMT. OF CHECK 105.00
BAL. CARRIED FORWARD 1566.24

Western S
11
Siket
Pay to the order of App
one-hun
Sikeston County B
314 North Renne
Sikeston, MO 638
Memo Offi

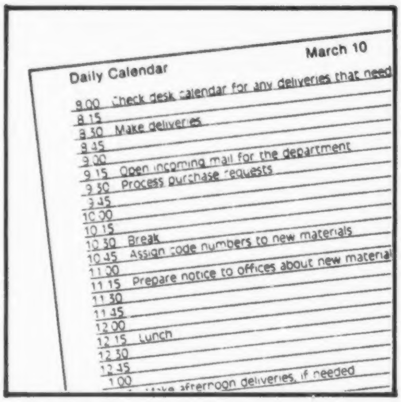
3. Be friendly.

"Hello, may I help you?"

4. Be tactful.

5. Be energetic.

6. Be well-organized.



Daily Calendar March 10
9 00 Check desk calendar for any deliveries that need
8 15
8 30 Make deliveries
9 45
9 00
9 15 Open incoming mail for the department
9 30 Process purchase requests
9 45
10 00
10 15
10 30 Break
10 45 Assign code numbers to new materials
11 00
11 15 Prepare notice to offices about new material
11 30
11 45
12 00
12 15 Lunch
12 30
12 45
1 00 Make afternoon deliveries, if needed

80

7. Be reliable.

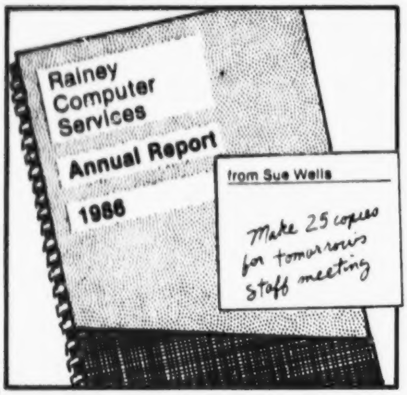
"Remind me to work on the Wilson project next week."
Next Friday...
8:00
8:15
8:30 Wilson Proj
8:45
9:00

8. Be stable.

9. Use a pleasant telephone voice.

"Good morning, Mary Bailey speaking."

10. Follow instructions carefully and accurately.



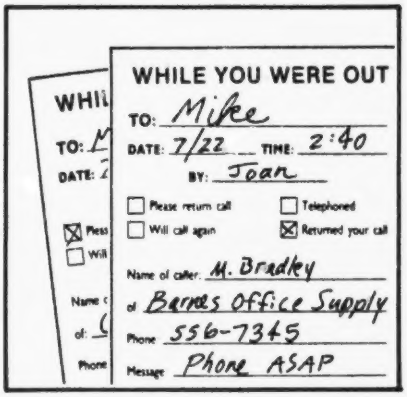
11. Be able to work alone without supervision.

"Mr. Bradford is out of the office this week; may I take a message?"

12. Maintain a positive, cheerful attitude.

13. Be on time. Follow the procedures of your office if an emergency arises and you must be late.

14. Avoid excessive absenteeism.



WHILE YOU WERE OUT

TO: Mike

DATE: 7/22 TIME: 2:40

BY: Joan

☐ Please return call ☐ Telephoned

☐ Will call again ☒ Returned your call

Name of caller: M. Bradley

of Barnes Office Supply

Phone 556-7345

Message Phone ASAP

15. Maintain a good appearance.

**DO SKILL SHEET 1**

## Job Keeping
# Skill Sheet 1

### What Skills are Required for Employment?

A survey of Help Wanted Ads from the February 2, 1986, editions of the **St. Louis Post Dispatch**, yields some important information. The ads revealed that employers seek employees who possess office knowledge and skills. Further, the ads reveal that employers seek employees who possess desirable personal traits.

The ads in the survey included entry-level clerical and secretarial positions. The skills, listed in random order, included the following:

1. typing
2. shorthand
3. office procedures
4. spelling
5. grammar
6. telephone skills
7. filing
8. data entry
9. record keeping
10. word processing
11. transcribing
12. greeting public
13. processing business forms
14. calculator
15. processing mail
16. proofreading
17. interpersonal skills
18. communication skills

Some of the desirable personal traits requested are shown in random order in the following list.

1. neat
2. accurate
3. friendly
4. tactful
5. personable
6. energetic
7. attractive
8. mature
9. well organized
10. self starter
11. reliable
12. stable
13. pleasant phone voice
14. able to grasp instructions
15. able to work alone, unsupervised
16. positive attitude

### Why Do Teen-agers Lose Jobs?

This question is answered in the March 1984 edition of **Tomorrow's Business Leader**. Employees think they lose jobs because they lacked experience or training. Employers, however, indicate that teen-agers lose jobs primarily because of absenteeism, tardiness, and inability to get along with other workers.

## Activities

List the business skills you have mastered.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

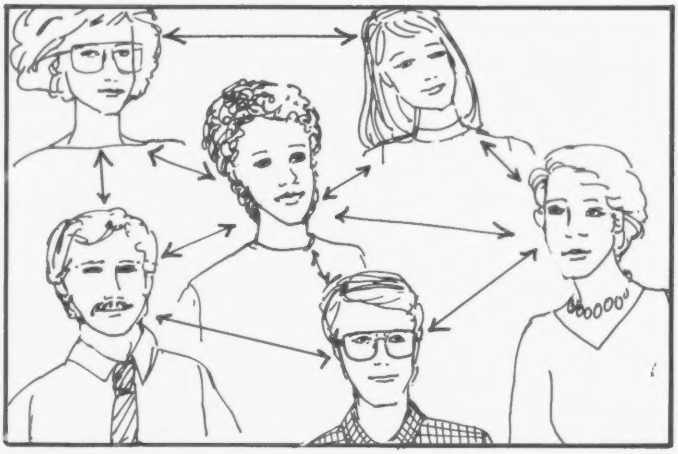
List several personal traits you feel best describe you. (You may be able to think of other traits in addition to the ones listed above.)

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________

## D. Guidelines for Planning for Advancement

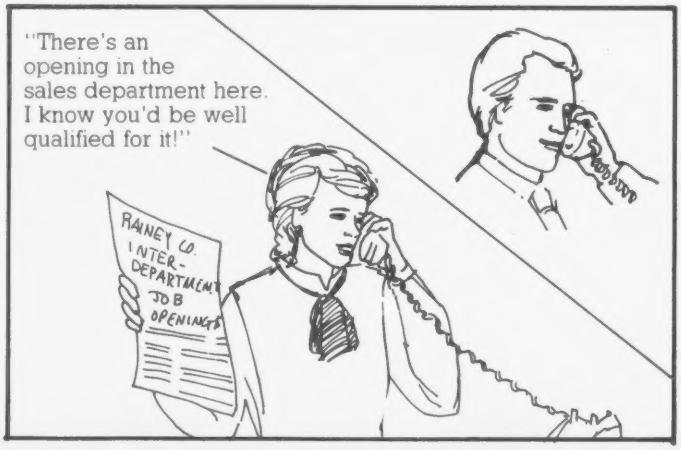
Networking means using the knowledge of acquaintances to help you to get a job or to advance from one job to the next. An example of networking would be to apply for a position that a friend of your family told you about. The following guidelines will help you establish a good network and plan for advancement into higher level positions.

1. Identify possible members of your network. These can include teachers, friends, employers, and other contacts in the business world.



2. Maintain a good reputation. If a member of your network knows of a position for which you are qualified, he or she will be anxious to tell you about it and to serve as a reference.

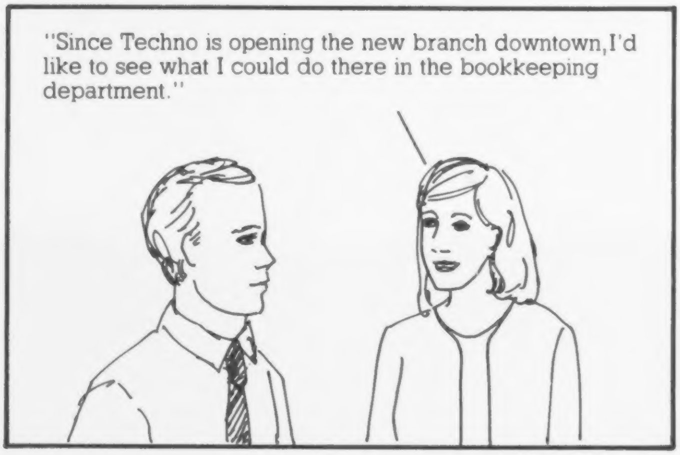
   **CAUTION: It would be a mistake to have someone recommend a friend for a job just because he or she is a friend. If the friend does not do well on the job, the network member's reputation with the employer will be damaged.**


"There's an opening in the sales department here. I know you'd be well qualified for it!"
RAINEY CO. INTER-DEPARTMENT JOB OPENINGS

3. Keep your network operating. Keep in touch with the members of your network.

4. Keep adding members to your networking list. You must take the initiative in introducing yourself to people who can help you advance to other positions.

5. Inform supervisors that you are interested in advancement.


"Since Techno is opening the new branch downtown, I'd like to see what I could do there in the bookkeeping department."

6. Improve your present business skills and develop new ones. Take advantage of training programs and/or special classes offered through your business.

7. Develop a plan of goals and objectives which will help you advance.

## DO SKILL SHEETS 2 AND 3

## DO ACTIVITY SHEET 1

## Job Keeping
# Skill Sheet 2

For the purposes of this activity sheet, networking means using the knowledge of acquaintances to help in getting a job or to advance from one job to the next. An example of networking is applying for a position that a member of your family told you about. In addition to family members, your network can include teachers, friends, employers, and other contacts in industry.

A very important part of the structure of networking is reputation. If a member of your network knows of a position for which you are qualified, he or she will be anxious to tell you about the position and will be happy to serve as a reference. It would be an error to recommend a friend for a position just because he or she is a friend. If the friend does not do well on the job, the network member's reputation with the employer will be damaged.

Another important thing to remember about networking is to keep the network operating. Keep in touch with members of your network. For example, teachers or placement personnel often learn of vacancies throughout the year, not just in April - July when many graduates are looking for initial employment. These important people in our networks should be informed as to whether graduates are still looking for positions or whether graduates are looking for advancement. The same advice applies to present supervisors. Don't forget to let them know that you are interested in advancements.

Finally, it is important to keep adding members to your networking list. You must take the initiative in introducing yourself to people who can help you advance to other positions.

### Activities

1. List the persons in your present network.

   a. ______________________________
   b. ______________________________
   c. ______________________________
   d. ______________________________
   e. ______________________________

2. List the ways you plan to keep your network members informed about your employment status.

   a. ________________________________

   b. ________________________________

   c. ________________________________

3. **Case Study**
   You work in the mail room of a large corporation. You would like to be promoted to a position in the shipping/receiving department. Discuss the steps you would take to add a new member to your network who could help you obtain the promotion.

## Job Keeping

# Skill Sheet 3

Setting goals helps students maintain a positive attitude throughout their school years. When we remember that we want to get an entry-level clerical/secretarial job after graduation, this keeps us motivated.

In order to reach goals, students should set objectives. Objectives are steps which are taken to reach goals. Examples of objectives are to use effective telephone techniques, to prepare a resume, and to compose a letter of application.

The following paragraph from the 1984-85 **Occupational Outlook Handbook** defines the job entitled "Order Clerk."

> Process orders for material or merchandise from customers or establishment employees. Inform customers of receipt or orders, prices, shipping dates, delays, or additional information needed on the orders. May route orders to departments for filling and follow up on orders to insure prompt delivery. May be designated according to method of receiving orders, such as Mail-Order Clerk or Telephone-Order Clerk; or according to type of order handled, such as Back-Order Clerk.

An appropriate goal could be written as follows: **To obtain the position of Order Clerk**. Some appropriate objectives might include the following statements.

I will be able to:

(a) proofread business forms for missing details,
(b) operate an electronic calculator,
(c) make outgoing telephone calls,
(d) fill out a routing slip, and
(e) compare business forms with incoming deliveries.

It is important to remember to set new goals. Getting that first job is not the end of goals. Advancing to jobs which have more responsibilities and better salaries is important in keeping a positive outlook on life.

## Activities

1. Write a goal statement for a position(s) for which you are training.

2. Write three objectives for the position(s) in Question 1.

   a. ____________________

   b. ____________________

   c. ____________________

3. Compare the following job definitions from the 1984-85 **Occupational Outlook Handbook**. Underline the new skills in the advanced position. Then write a goal and three objectives for the advanced position.

**File Clerk**

File correspondence, cards, invoices, receipts, and other records in alphabetical or numerical order, or according to the filing system used. Locate and remove material from file when requested. May be required to classify and file new material.

**Clerical Supervisors, Office or Plant**

Supervise and coordinate activities of workers engaged chiefly in one type of clerical function such as typing, filing, bookkeeping, tabulating data, etc. May assume responsibility for completion of work assignments by clerical force being supervised and for the accuracy of completed assignments.

Write a goal.

List three objectives.

a. ____________________

b. ____________________

c. ____________________

## Job Keeping
# Activity Sheet 1

The ability to attract people to you is achieved by good interpersonal skills. The skills involve a positive self-image, good personality traits, and a neat physical appearance. While a comprehensive discussion of interpersonal skills can fill several books, the next three paragraphs are presented to help you in the role-playing activities that follow.

### Developing a Postive Self-Image

Throughout our lives we see people we want to pattern our behavior after. For example, we might think to ourselves: "Gee, I wish I could type as fast as what's her name." A negative self-image can lead to feelings of jealously or cause us to just accept whatever life brings our way. A positive self-image helps us remember that we are worthy individuals and to try to make the best of what we have. We also need to believe that most people are trustworthy and will accept us as we are.

### Developing Good Personality Traits

Personality traits can be thought of as good habits. For example, teenagers become reliable by practicing being on time for classes and by having their homework ready for class. Undesirable traits turn people off and cause them to not want to have anything to do with us. Examples of undesirable traits include always complaining about something, sloppiness, and constantly making excuses.

### Maintaining A Desirable Physical Appearance

An attractive outward appearance depends on feeling good inside as well as looking good on the outside. When we feel good about ourselves, we usually stand or sit erect with our heads up. Good posture, in turn, makes our body work better, and we feel better. Therefore, we can get more work done. People think we are more energetic and friendly. When we look good on the outside, that makes us feel better and gives us confidence in meeting and working with others.

Role-playing Activities

**Situation 1:**
You have to stop on your way to work this morning to have air put into your left front tire. You arrive at work later than normal and have to drive around a few extra minutes to find a parking spot. So you arrive on your floor of the office building realizing that you are late for work. You rush into the office pausing only to say, "Excuse me," to two people standing in your way. You plop into your chair, exhale, and look up to see your supervisor standing there with the new employee for your department. You suddenly realize that you went past them without a greeting (such as, good morning), without saying the supervisor's name (Mrs. Ford), and without your usual smile. You feel a great distance opening up between you and your supervisor. How can you regain a "comfortable" feeling?

**Situation 2:**
You work in the billing department now. However, you have been taking night courses in word processing. During your afternoon break yesterday, you finally got up enough courage to make the acquaintance of Sally who works in word processing. Sally calls today and invites you to walk to a local restaurant for lunch. It is warm outside. You are keeping your blazer on today since you didn't have time to press your blouse. You make some excuse about not feeling well and decline Sally's offer. After you hang up, you wonder whether Sally will call again since you rejected her offer. If you could relive these past two minutes, would you accept the offer?

**Situation 3:**
Peggy's desk is across from yours. Peggy has recently developed a new habit that annoys you. You have tried to stop speaking to her hoping that she would take the hint. She thinks you are just being mean to her. You both like your jobs very much and both want to stay in the department. How can you begin to let Peggy know how you feel?

# Job Keeping Skills
# Unit Review

**Directions:** Provide answers fo the following questions.

1. Indicate whether the following terms are (B) business skills or (P) personal traits by writing the correct letter in each blank.
   a. dependability ________
   b. typing rate of 50 wpm ________
   c. spell medical terms ________
   d. transcribe medical reports ________
   e. sensitivity ________
   f. insincere praise ________

2. Indicate whether the following concepts are positive (attracting) interpersonal factors or negative (repulsing) interpersonal factors by circling the correct letter.
   a. trusting others P N
   b. losing one's temper P N
   c. talking too loudly P N
   d. breaking promises P N
   e. suggesting alternatives P N
   f. embarrassing others P N

3. What is networking?

________________________________________

________________________________________

4. Choose one of the following ads. Write a goal and three objectives.

CLERICAL

Financial institution located in Clayton is looking for an assistant to Loan Dept management staff. Will perform clerical and other duties as needed. General secretarial skills, typing min. 55wpm and a desire to learn are necessary. Excellent fringe benefits. Send resume to:

Reply to: CLERICAL
BOX A52 POST-DISPATCH
900 N. Tucker, St. Louis, Mo. 63101
Equal Opportunity Employer

---

clerical
FINANCIAL INSTITUTION seeking Mail Receipts Clerk and Accounting Clerk for Cave Springs office. Positions require CRT, 10-key calculator, data entry and typing skills. Good math aptitude and excellent organizational skills plus the ability to deal effectively with the public in a fast paced environment, are essential. Excellent fringe benefits and working conditions. May apply in person Mon-Fri, 9:30-4:30 at Educational Employees Credit Union, 1077 Cave Springs Bl., St. Peters, or send resume to: P.O. Box 1810, St. Charles, MO 63302. For additional information call 928-0101.

Equal Opportunity Employer

---

☆
GENERAL OFFICE
☆

Immediate opening for individual to work full time. This is an entry level position. Right person should have typing skills, 10 key adding machine experience, CRT helpful but not necessary, neat in appearance and pleasant phone voice. We offer salary and company benefits. Apply 8am-5pm at 11170 Dorsett Road, Maryland Heights, MO. EOE

---

CLERK/TYPIST

Full time days (8 a.m. to 4:30 p.m.) Requires high school education and good typing skills. Must also possess good telephone manners.

For immediate consideration, apply in person between the hours of 9 a.m. to 3 p.m.

DEPAUL HEALTH CENTER
12303 DePaul Dr.
Bridgeton, MO 63044
Equal Opportunity Employer
M/F/H/V

★ ★ ★

---

★

GENERAL OFFICE

Large Clayton CPA firm has an immediate full-time opening for a General Office Person. Duties include filing, copying, mail distribution and light typing. Some office experience required. We offer good job environment, competitive compensation, paid parking, fringe and profit sharing benefits.

RUBIN, BROWN
GORNSTEIN & CO.
230 S. Bemiston
Clayton, MO 63105
727-8150

★

---

RECEPTIONIST

Full time position in health care related corporation. Pleasant phone voice, and excellent communication skills essential. Minimum typing speed of 55 WPM. Excellent pay, benefits and enviroment. Airport location. Send resume.

Reply to:
BOX A89 POST-DISPATCH
900 N. Tucker, St. Louis, Mo. 63101

---

RECEPTIONIST-Must be bright-busy Doctor's office, flexible hours demanded-$900/mo. plus fringe benefits. 569-0792.

Clerical

★

## CLERICAL OPPORTUNITIES

Due to continued expansion Penn-Corp Group Management located in Crestwood has the following openings:

### ACCOUNTING CLERK

Individual must possess familiarity with 10 key calculator and good figure aptitude. Excellent communication and record keeping skills required. Personal computer experience desired.

### PROCESSING CLERK

The qualified individual must have 1 year office experience and typing of 40 wpm desirable. Candidate must be able to withstand reaching, bending and standing.

Call for appt.

849-5555

---

★

## CLERICAL

Angelica Uniform Group, the nation's largest manufacturer of career/institutional apparel is currently seeking to fill an entry level clerical position. Ideal candidate will be a high school graduate and possess 1 year of office experience. Excellent communication skills and typing ability of over 50 wpm a must. IBM PC and CRT experience helpful. Interested candidates please send resume along with salary requirements to:

ANGELICA UNIFORM GROUP
Attention: T. Wehrle
700 Rosedale
St. Louis, MO 63112
An Equal Opportunity Employer
M/F/H/V

---

Clerical

## MAIL CLERK

A well established company located in Southwest St. Louis county has an immediate opeing for a Mail Clerk.

This is an entry level position which will include general clerical duties, and relief on swithboard. Write or send resume in complete confidence to:

Personnel
P.O. Box 26291
Fenton, MO 63026

Equal Opportunity Employer
M/F/H/V

## Job Keeping
# Performance Checklist

Student ______________________ has successfully performed the following steps of procedure.

| Job Keeping Skills | Yes | No | Comments |
|---|---|---|---|
| 1. Identified business skills needed for employment | | | |
| 2. Demonstrated desirable personal traits for clerical/secretarial employee: | | | |
| neat | | | |
| accurate | | | |
| friendly | | | |
| tactful | | | |
| energetic | | | |
| well-organized | | | |
| reliable | | | |
| stable | | | |
| pleasant telephone voice | | | |
| followed instructions carefully and accurately | | | |
| worked without supervision | | | |
| positive, cheerful attitude | | | |
| punctual | | | |
| seldom absent | | | |
| good work appearance | | | |
| 3. Planned for advancement: | | | |
| identified possible members of a personal network | | | |
| contacted network member(s) | | | |
| developed a plan to improve business skills | | | |
| developed a plan of goals and objectives | | | |

Satisfactory - Should Move On ☐
Repeat This Unit ☐

______________________ Student Signature/Date

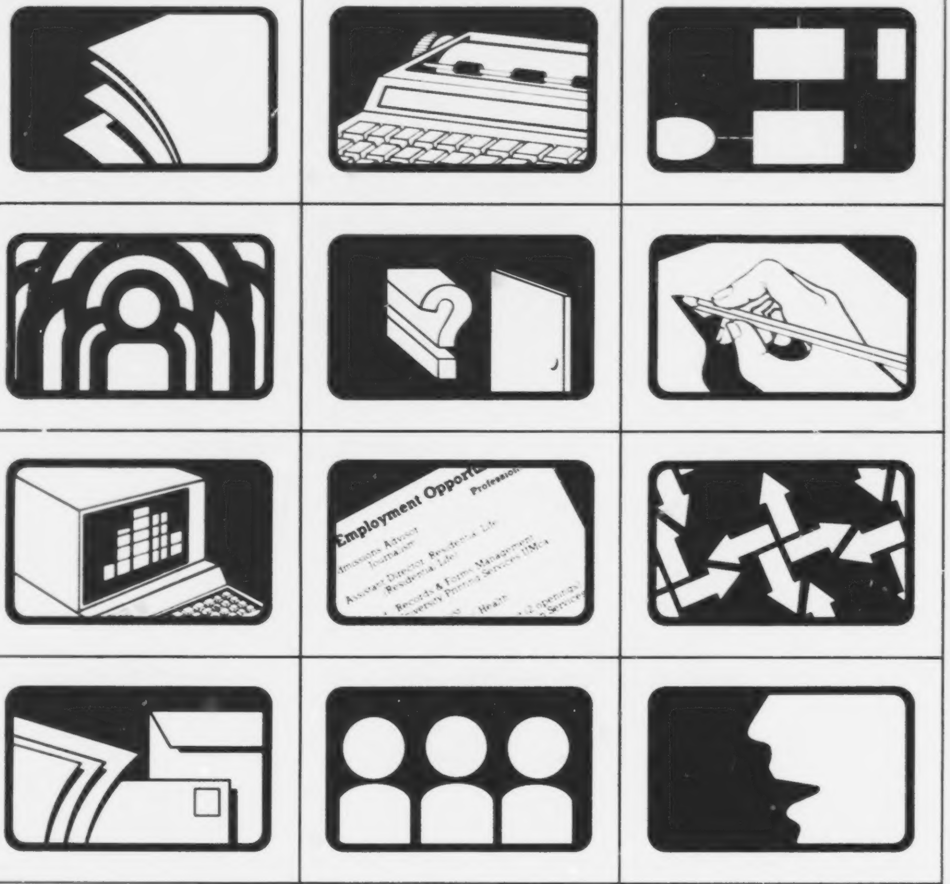
______________________ Instructor Signature/Date

SN-92-S

SUPPLEMENTARY UNITS FOR
SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

# Proofreading

## Unit 2



PRODUCED BY
INSTRUCTIONAL MATERIALS LABORATORY • UNIVERSITY OF MISSOURI-COLUMBIA • COLUMBIA, MO 65211
FUNDED BY
DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION • JEFFERSON CITY, MO 65102

## Proofreading
# Introduction

The ability to proofread well is not acquired through luck. To be a good proofreader, you must have some general business and English knowledge. This includes knowing parts of business letters and reports, sentence structure, punctuation, capitalization, spelling, and use of numbers.

This may seem like a lot to learn but if you study a part at a time, you will be surprised how quickly you can understand what to look for when proofreading.

This unit will show you the most common proofreaders' marks to use, and it will look at punctuation, spacing rules, and procedures for proofreading copy.

---

## Unit Objective

After completion of this unit, you should be able to recognize and use proofreaders' marks.

## Specific Objectives

After completion of this unit, you should be able to:

1. Understand common proofreaders' marks.
2. Identify spacing before and after certain special keys.
3. Proofread numeric copy.
4. Proofread business letters.

---

## Are You Ready?

Check the statement which is true for you.

☐

I can do the above tasks and I am ready to do the Performance Checklist.

**SEE YOUR INSTRUCTOR**

☐

I want to study the information in this unit before doing the Performance Checklist.

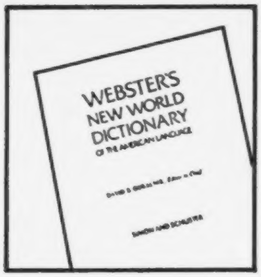
**TURN TO NEXT PAGE AND BEGIN**

## A. Terms and Equipment for Proofreading

### Terms

1. Numeric copy - material containing numbers
2. Proofreading copy - checking materials for typos and other errors
3. Proofreaders' marks - symbols showing changes to be made in typed copy
4. Reference manual - book containing rules for punctuation, capitalization, word usage, word division, letter styles, grammar, number usage, forms of addresses, abbreviations, etc.
5. Typos - errors in keyboarding such as transposed (switched) letters, omitted letters, or extra letters

### Equipment

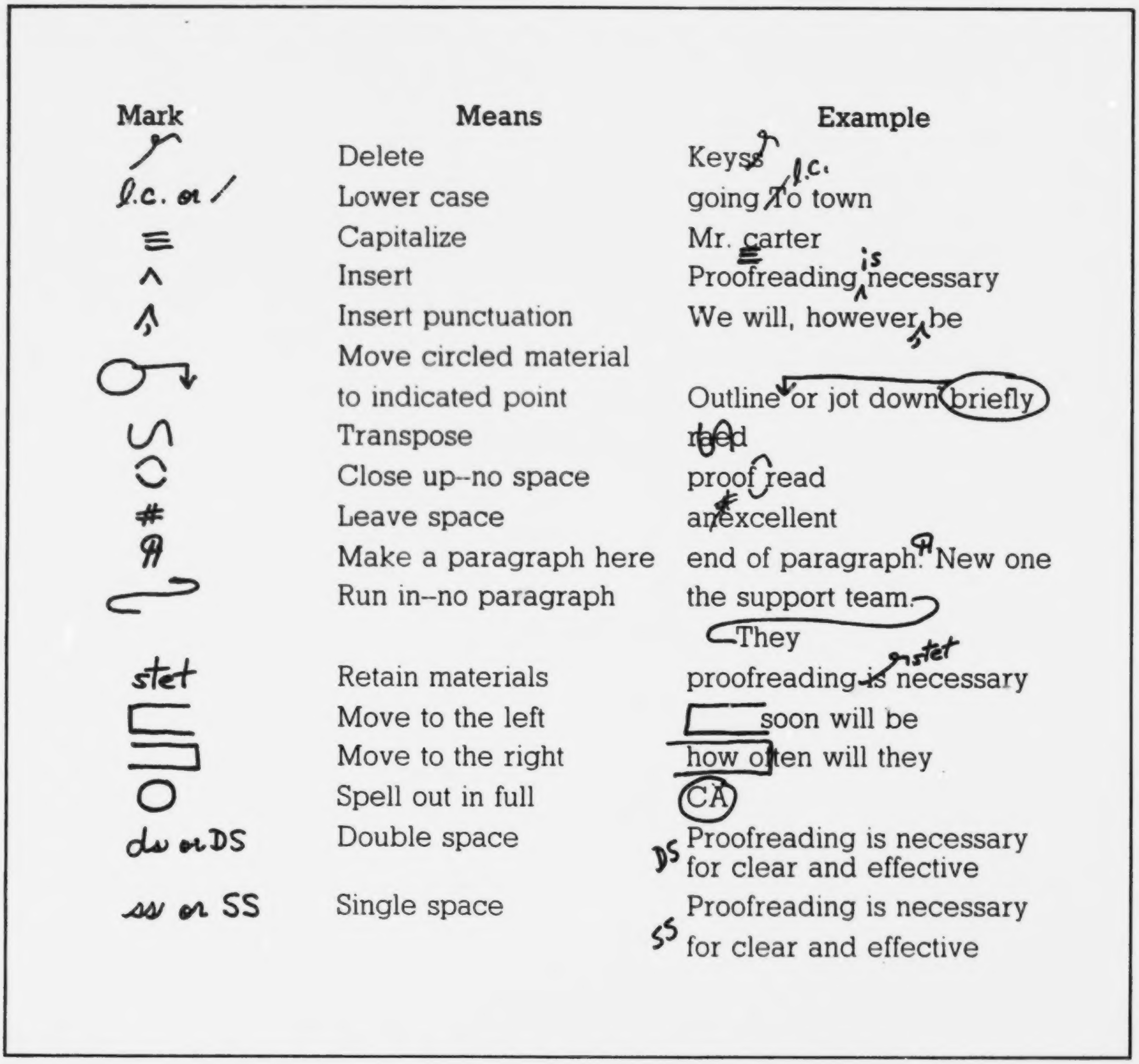


Dictionary

Reference Manual

Word Book

## Proofreaders' Marks

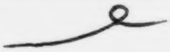


| Mark | Means | Example |
|---|---|---|
| ℊ | Delete | Keys~~s~~ ℊ |
| l.c. or / | Lower case | going ~~T~~o town l.c. |
| ≡ | Capitalize | Mr. carter ≡ |
| ^ | Insert | Proofreading ^ is necessary |
| ^, | Insert punctuation | We will, however ^, be |
| ○→ | Move circled material to indicated point | Outline ↓ or jot down (briefly) |
| ∽ | Transpose | raed |
| ⁀‿ | Close up--no space | proof read |
| # | Leave space | an # excellent |
| ¶ | Make a paragraph here | end of paragraph. ¶ New one |
| ⤷ | Run in--no paragraph | the support team. They |
| stet | Retain materials | proofreading ~~is~~ stet necessary |
| [ | Move to the left | [ soon will be |
| ] | Move to the right | how often ] will they |
| ○ | Spell out in full | (CA) |
| ds or DS | Double space | DS Proofreading is necessary<br>for clear and effective |
| ss or SS | Single space | SS Proofreading is necessary<br>for clear and effective |

## B. Understanding Proofreaders' Marks

Typed materials must be proofread or checked for typos and other errors. Proofreaders' marks are used to show where corrections and changes should be made.

1.

| | |
|---|---|
|  | delete, take out this material |
| This ~~typed~~ material is about to be revised. | This material is about to be revised. |

2.

| | |
|---|---|
| l.c. or l | lower case, do not capitalize |
| The club $\overset{\text{l.c.}}{\cancel{P}}$resident was absent. | The club president was absent. |

3.

| | |
|---|---|
| ≡ | capitalize, use capital letter here |
| Give your report to $\underset{\equiv}{j}$im Wilson by Tuesday. | Give your report to Jim Wilson by Tuesday. |

4.

| | |
|---|---|
| ∧ | insert, add material here |
| The $\overset{\text{office}}{\wedge}$ manager needs our report as soon as possible. | The office manager needs our report as soon as possible. |

5.

| | |
|---|---|
| ¶ | paragraph: start a new paragraph here |
| We will meet at 7:15 in Room 209.¶All executives and office staff should bring their reports. | We will meet at 7:15 in Room 209.<br>All executives and office staff should bring their reports. |

6.

| | |
|---|---|
| ⁀‿ | close up: leave no space between these |
| He will finish with⁀in the allotted time. | He will finish within the allotted time. |

7.

| | |
|---|---|
| ⊏ | move left: move this material to the left |
| ⊏ In reference to the preceding report, the following data should be added. | In reference to the preceding report, the following data should be added. |

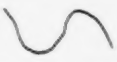
8.

| | |
|---|---|
| ‸. | insert punctuation: put this punctuation mark here |
| We have finished our progress report. Bob is drawing the necessary diagrams‸ | We have finished our progress report. Bob is drawing the necessary diagrams. |

9.

| | |
|---|---|
| ○→ | move: take this material to where the arrow is |
| It is therefore necessary to take some positive action. | It is necessary therefore to take some positive action. |

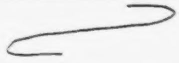
10.

| | |
|---|---|
|  | transpose, reverse the order of these letters or words |
| I did not yet recieve the shipment of computer paper which was last ordered week. | I did not yet receive the shipment of computer paper which was ordered last week. |

11.

| | |
|---|---|
| stet | retain materials, do not change this material |
| Please complete the enclosed form and return it to me by September ~~17~~. stet | Please complete the enclosed form and return it to me by September 17. |

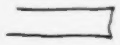
12.

| | |
|---|---|
|  | run in, no paragraph, do not start new paragraph here |
| We will be providing inservice sessions later.<br>The person in charge is Bill Smith. | We will be providing inservice sessions later. The person in charge is Bill Smith. |

13.

| | |
|---|---|
| # | space, insert a space here |
| Mr. Bob Johnsonis on vacation this week, but he maybe in the office on Friday. # | Mr. Bob Johnson is on vacation this week, but he may be in the office on Friday. |

14.

| | |
|---|---|
|  | move to the right, move this material to the right |
| Having received the weekly sales reports, we are preparing a composite analysis of sales. | Having received the weekly sales reports, we are preparing a composite analysis of sales. |

15.

| | |
|---|---|
| ○ | spell out in full, do not abbreviate |
| These booklets should be mailed to each doctor in Newton, MO. | These booklets should be mailed to each doctor in Newton, Missouri. |

16.

| | |
|---|---|
| SS | single space, type this single spaced |
| ss The following tasks must be completed by Friday: schedule the committee meeting, gather | The following tasks must be completed by Friday: schedule the committee meeting, gather |

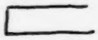
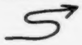
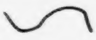
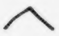
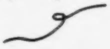
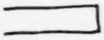
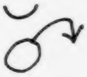
17.

| | |
|---|---|
| DS | double space, type this material double spaced |
| DS When provided with a list of prospective customers, we will computerize a mailing list and print out the necessary labels. | When provided with a list of prospective customers, we will computerize a mailing list and print out the necessary labels. |

**DO SKILL SHEETS 1 AND 2**

## Proofreading
# Skill Sheet 1

**Directions:** Match the proofreaders' marks to their meanings by writing the letter for the correct meaning in the space next to the proofreaders' mark.

_______ 1. 
_______ 2. 
_______ 3. 
_______ 4. 
_______ 5. 
_______ 6. 
_______ 7.
_______ 8. 

a. delete
b. close up
c. move right
d. move left
e. move
f. reverse (transpose)
g. insert (add)
h. run in (no paragraph)

**Directions:** Write the correct proofreaders' mark in each space provided below.

1. _______ lower case (do not capitalize)
2. _______ upper case (capitalize)
3. _______ insert a space
4. _______ start a new paragraph
5. _______ do not change
6. _______ spell out (do not abbreviate)
7. _______ single space
8. _______ double space

# Proofreading
# Skill Sheet 2

Directions: Type the following story, making all of the changes indicated by the proofreader's marks.

## Happy Moments With Sven Andrew

We often enjoy time spent with little children because they are so natural. For example, when Sven Andrew was about three years old, he stayed in the bathroom for a while longer thann usual. (little ones love to play with the paper in the bathroom.) I thought to myself, he is just pulling paper off for onec I'll let him pull off papper to his heart's desire.One robl can't hurt. But soon he come into the kitchen.He gad on pajajas that covered him from shoulders to toes. There seemed to be quite a bundle inside his pajamas. "look, Mommie," he said. "See may cottontail. I'ma bunny".

DS

When sven andrew was about 4 yrs old, he watched very quitely one day as I shelled pecans. this time I "Accidently" let one shelled half get colse to him hoping that he would pick ti up examine it and ask questions. He surprised me.

He papped it into his mouth & began chesing before I had cleaned the hully Matter between the ridges. Quicly he spit the out morsel exclaiming, "monnie, mommie, theres a skunk in my mouth!" When Sven as in the First Grade, he brought home a paphlet about plants. sven had not read through the Entire Pamphlet. I was reading it ovre and said, "Sven it says here that if you put a sweet potato in water, you get losts of leaves." I read a little farther. "Sven , it ways here that fi you put a pineappl in water, it..." "Don't tell Me." He said indicating by his tone that He didn't want to be disturbed further form his tosy. "you get a pine tree. "

## C. Guidelines for Spacing and Special Keys

When preparing business correspondence and other typed materials, it is important to know how to type special symbols and what spacing is needed for them. Here are some spacing guidelines for frequently used punctuation marks and symbols.

1. Colon :
   Leave 2 spaces after a colon.

   > We need to order the following supplies:  white bond paper, letterhead, and envelopes.

2. Period .
   Leave 2 spaces after every period (or other end of sentence punctuation such as question marks or exclamation points).

   > The meeting will start at 5 o'clock.  We will adjourn at 10 p.m.

3. Comma ,
   Leave one space after every comma (except when it is used in numbers).

   > Our president, Mr. Jameson, has asked me to send you an application form.

4. Hyphen -
   Do not space before or after a hyphen used to divide a word.

   > We are sponsoring a two-day meeting.

5. Dash --
   Do not leave a space before or after a dash.

   > We will be there--unless the conference runs late.

6. Quotation marks " "
   Surround the material being quoted with quotation marks.

   > His comment was, "Of course, we will still have the meeting."

7. Percent %
Do not space between a number and a percent sign.

There will be a 5% increase in shipping and handling charges.

8. Dollar sign $
Cent sign c
Do not space between a dollar sign or cent sign and the number.

A fee of $25.50 will need to be collected.

9. Telephone numbers
These may be typed with parentheses or hyphens.

1 (918) 555-1212 or 1-918-555-1212

10. pound symbol #
Do not space between the pound symbol and the number.

16# bond paper

11. Number or No.
Numbers may be indicated with a # or abbreviated as No. and followed by one space.

#72 or No. 72

12. Decimal point .
Do not space between a decimal point and the number.

```
$14.25
  8.36
   .79
```

**DO SKILL SHEET 3**

# Proofreading
# Skill Sheet 3

Directions: Use proofreaders' marks to show the correct usage and/or spacing before and after the special keys used in the following sentences. If a sentence is correct, place a "C" in the answer blank provided. Check your work with the answer key. Then, type all the sentences in correct form on a sheet of paper.

**Hyphens**

1. Most calls should be placed on a station - to - station basis. _____
2. Each is staffed by factory -trained people who know our calculators. _____
3. Each letter will include a two- to three-page brochure. _____

**Telephone Numbers**

4. If you have a question about our product, call us at 1 800 222-1000. _____
5. Her telephone number is 307-989-2301. _____

**Money**

6. Enclosed is our check for $776. in payment of your fee. _____
7. The price will increase from 30 cents to 42 cents. _____
8. The prices ranged from $ .95 to $1.09 per ounce. _____

**Quotations**

9. He said, "That is all". _____
10. The assignment was to read the chapter entitled" Skin Care." _____

## Percent

11. We pride ourselves on helping our clients cut costs by 40 percent. ______

| County | 1980 Census | 1985 Census | Percent of Increase | |
|---|---|---|---|---|
| Bloomfield | 200,000 | 250,000 | 25% | ______ |
| Appleton | 100,000 | 110,000 | 10 | ______ |
| Sweeton | 300,000 | 300,000 | 0 | ______ |

## Number and Symbol Sign

13.

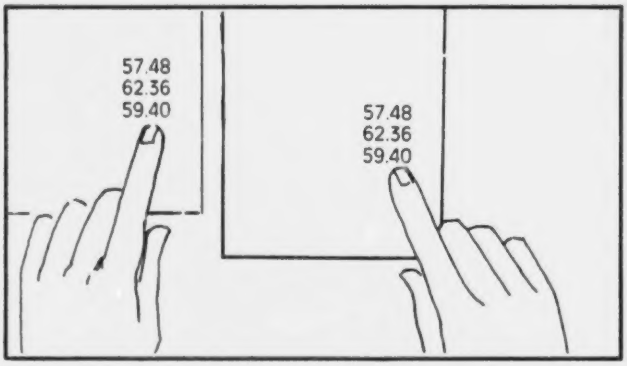
| Quantity | Description | Unit Price | Total | |
|---|---|---|---|---|
| 8 reams | 20 bond paper | 2.25 | 18.00 | ______ |
| 6 reams | 16 ditto paper | 1.25 | 7.50 | ______ |

14. Our model No. 118 delivers up to 150 copies per minute. ______

## D. Guidelines for Proofreading Numeric Copy

If you make an error involving a misspelled word, you can usually understand the meaning anyway. However, a mistake in numeric copy can change the entire value of the material. The following guidelines can help you check numeric copy.

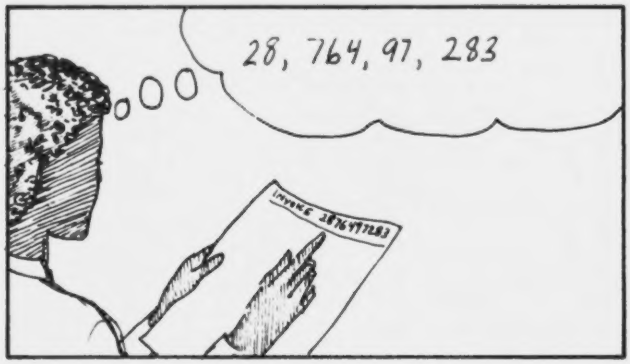
1. Check each number carefully, digit by digit.



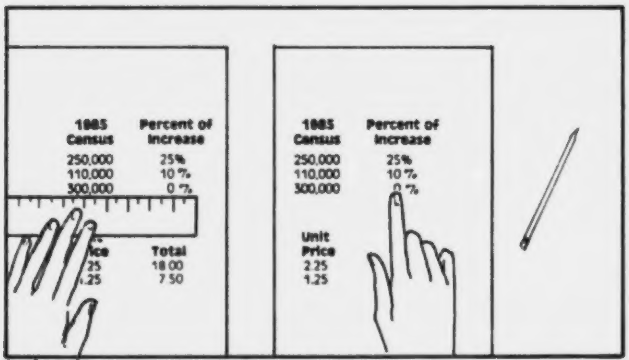
2. Read long numbers in groups of two and three.

   For example,

   "2876497283" could be read as "28" "764" "97" "283."



3. Lay a ruler on the original copy to guide yourself as you proofread each line.



4. Make sure columns of numbers line up evenly on the right.

| |
|---:|
| 273 |
| 897,406 |
| 3,870 |

5. Having a coworker read numbers aloud as you silently proofread your final copy is a good way to check numeric copy.

6. Verify computations.

Common Errors in Numeric Copy:

Misplaced decimal points

For example,
98.6 should be 9.86

| | |
|---:|---:|
| $25.38 | $25.38 |
| 49.23 | 49.23 |
| 98.6 | 9.86 |
| 21.49 | 21.49 |

Misaligned numbers

For example, the decimal in 7.3 should be aligned with the decimals in the other numbers

| | |
|---:|---:|
| 98.6 | 98.6 |
| 7.3 | 7.3 |
| 4.0 | 4.0 |

Transposed figures

For example,
62.73 should be 62.37

| | |
|---:|---:|
| $23.01 | $23.01 |
| 42.29 | 42.29 |
| 62.73 | 62.37 |
| 57.84 | 57.84 |

Wrong numbers

For example,
57.84 should be 57.83

| | |
|---:|---:|
| $16.11 | $16.11 |
| $57.84 | $57.83 |
| $29.38 | $29.38 |

Wrong symbols

For example,
¢59.40 should be $59.40

| | |
|---:|---:|
| ¢59.40 | $59.40 |
| $38.01 | $38.01 |
| $ 6.11 | $ 6.11 |

**DO SKILL SHEET 4**

# Proofreading
# Skill Sheet 4

**Directions:** Below you will find a list of products that appeared in a catalog. A purchase order has been prepared to request some of the products. Proofread the purchase order to make sure it has been prepared correctly. Use proofreaders' marks to correct any errors that you find on the purchase order.

OFFICE SUPPLY CATALOG

| | | |
|---|---|---|
| Removable Transparent Tape | | |
| B30-591, 1" wide tape | $5.75 ea. | |
| B30-590, 3/4" wide tape | $4.35 ea. | |
| Book Tape | | |
| B30-420,1 ½" wide | $3.00 ea. | $2.90 ea. for 6 or more |
| B30-421, 2" wide | $3.99 ea. | $3.89 ea. for 6 or more |
| Masking Tape | | |
| B36-305, 1/4" wide | $1.15 ea. | $1.10 ea. for 12 or more |
| B36-307, ½" wide | $1.51 ea. | $1.45 ea. for 12 or more |

PURCHASE ORDER

| Quantity | Description | Unit Price | Total |
|---|---|---|---|
| 5 | B300591 removable transparent tape, 1" wide | 5.75 | 28.70 |
| 6 | B40-320 book tape, 1 1/2" wide | 29.0 | 17.40 |
| 1 | B30-421 book tape, 2" wide | 3.99 | 3.99 |
| 12 | B36-305 masking tape, 1/8" wide | 1.01 | 13.20 |
| 10 | B36-307 masking tape, 1/2" wide | 1.52 | 15.20 |
| | | | 74.50 |

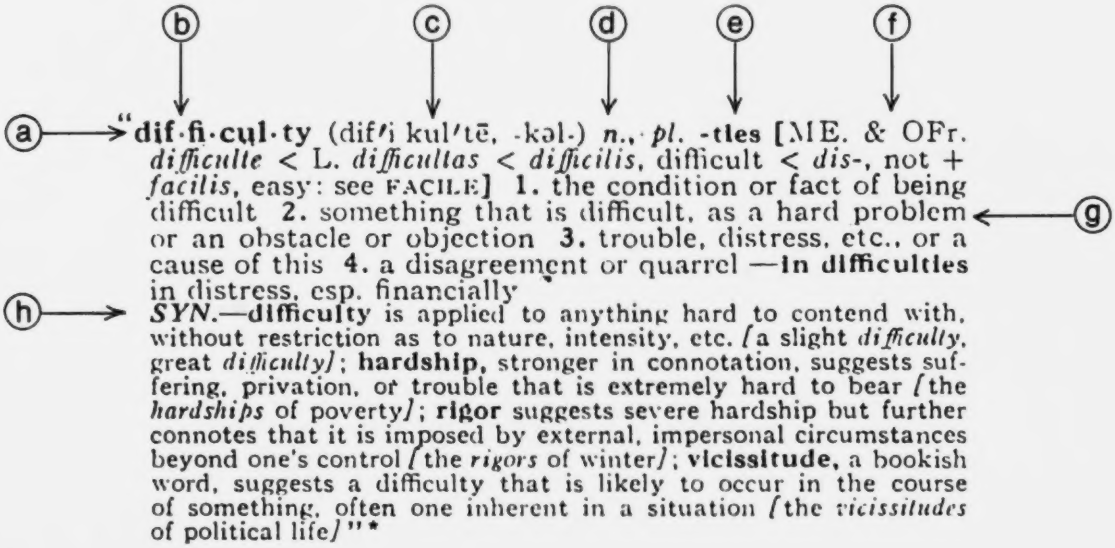
## E. Using References

References are books which contain useful information. There are many types of reference manuals. References that are helpful when proofreading include dictionaries, grammar or style handbooks, and word books.

1. A dictionary can be used to check the spelling of words and the way to divide words. The dictionary can be used to find the meaning of a word to make sure the word is used correctly. Words are listed in a dictionary in alphabetical order. **NOTE: There are dictionaries for special areas, such as medicine, law, and engineering.**

A dictionary entry gives such information about a word as:

a. how the word is spelled
b. how the word is divided into syllables
c. how the word is said (the pronunciation)
d. what part of speech the word is (noun, pronoun, adjective, adverb preposition, conjunction, interjection, etc.)
e. how to spell the plural form of the word
f. where the word comes from (its etymology)
g. what the word means (definition)
h. what other words have the same meaning (synonyms)



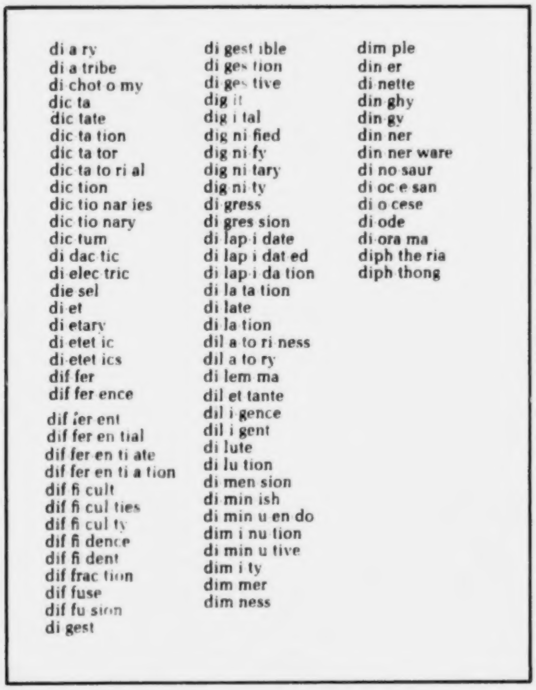
"**dif·fi·cul·ty** (dif′i kul′tē, -kəl-) ***n.***, *pl.* **-ties** [ME. & OFr. *difficulte* < L. *difficultas* < *difficilis*, difficult < *dis-*, not + *facilis*, easy: see FACILE] **1.** the condition or fact of being difficult **2.** something that is difficult, as a hard problem or an obstacle or objection **3.** trouble, distress, etc., or a cause of this **4.** a disagreement or quarrel —**in difficulties** in distress, esp. financially

*SYN.*—**difficulty** is applied to anything hard to contend with, without restriction as to nature, intensity, etc. [a slight *difficulty*, great *difficulty*]; **hardship**, stronger in connotation, suggests suffering, privation, or trouble that is extremely hard to bear [the *hardships* of poverty]; **rigor** suggests severe hardship but further connotes that it is imposed by external, impersonal circumstances beyond one's control [the *rigors* of winter]; **vicissitude**, a bookish word, suggests a difficulty that is likely to occur in the course of something, often one inherent in a situation [the *vicissitudes* of political life]"*

---

*__Webster's New World Dictionary__. 1984 ed.

2. A word book (or quick reference) shows the correct way to spell and divide words. This reference is shorter and can be used more quickly than a dictionary. The word book does not have as many words or as much information as a dictionary. Words are listed in a word book in alphabetical order.
**NOTE:** **There are word books for special areas, such as medicine and law.**



di·a·ry
di·a·tribe
di·chot·o·my
dic·ta
dic·tate
dic·ta·tion
dic·ta·tor
dic·ta·to·ri·al
dic·tion
dic·tio·nar·ies
dic·tio·nary
dic·tum
di·dac·tic
di·elec·tric
die·sel
di·et
di·etary
di·etet·ic
di·etet·ics
dif·fer
dif·fer·ence
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dif·fer·en·ti·ate
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dif·fuse
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di·lap·i·date
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din·gy
din·ner
din·ner·ware
di·no·saur
di·oc·e·san
di·o·cese
di·ode
di·ora·ma
diph·the·ria
diph·thong

3. A grammar or style handbook can be used to find rules for grammar and punctuation and guidelines for writing effectively. To find information in this type of handbook or manual, you will need to use the table of contents or the index.
**NOTE:** Many different grammar and style handbooks are available. Check to see which handbook or manual is acceptable for use in your office.

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Standard Style Manual

Table of Contents

Chapter One: Punctuation
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Plurals . . . . . . . . [illegible]
Possessives . . . . . . [illegible]
Compounds . . . . . . . [illegible]

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Standard Style Manual Comma [illegible]

COMMA

The comma is the most frequently used punctuation in English. It is most commonly used to separate items in a series and to set off elements within sentences. Within these two broad categories, there are a great many specific uses to which commas can be put. Most common uses of the comma include:

Between Main Clauses
With Compound Predicates
With Subordinate Clauses and Phrases
With Appositives
With Introductory and Interrupting Elements
With Contrasting Expressions
With Items in a Series
With Compound Modifiers
In Quotations, Questions, and Indirect Discourse
With Omitted Words
With Addresses, Dates, and Numbers
With Names, Degrees, Titles
In Correspondence
Other Uses

BETWEEN MAIN CLAUSES

1. A comma separates main clauses joined by a coordinating conjunction (as and, but, or, nor, and for)

---

**DO SKILL SHEET 5** **DO ACTIVITY SHEET 1**

# Proofreading
# Skill Sheet 5

**Directions:** For each of the situations described below, tell what type of reference could be used to find the needed information. Some items may have more than one correct answer.

Possible answers include:

- dictionary
- word book (quick reference)
- grammar/style book

1. To check the spelling of a word
2. To find out the correct way to use a comma in a sentence that lists several items
3. To find out how to divide a word at the end of a line
4. To find out what a word means
5. To find the correct way to use quotation marks
6. To find another word with the same meaning
7. To find out whether a word is an adjective or an adverb
8. To find out when to use italics
9. To decide whether to use a dash or a colon
10. To find how to spell the plural form of a word

## Proofreading
# Activity Sheet 1

**Directions:** Use a dictionary, word book, or grammar/style handbook as indicated to answer the following questions.

1. Use a word book (quick reference) for spelling and word division to find the correct way to divide these words.
   Example: difficulty dif-fi-culty
   population ____________________
   eventually ____________________
   recognizable ____________________
   advantageous ____________________
2. Use a word book (quick reference) for spelling and word division to correct the spelling of these words.
   Example: difikulty difficulty
   expediant ____________________
   refered ____________________
   conceed ____________________
   developement ____________________
3. Use a dictionary to find the correct way to spell the plurals of these words.
   Example: difficulty difficulties
   tomato ____________________
   mother-in-law ____________________
   crisis ____________________
   alumnus ____________________
4. Use a grammar/style handbook to find the information requested.
   What is the abbreviation for "trademark"?

   ____________________

   What is the abbreviation for "Master of Education"?

   ____________________

   Are the names of the seasons capitalized?

   ____________________

   What is the rule for expressing amounts of money that include mixed amounts of dollars and cents?

   ____________________

   How is the possessive of a proper name ending in "s" (for example, Jones) written?

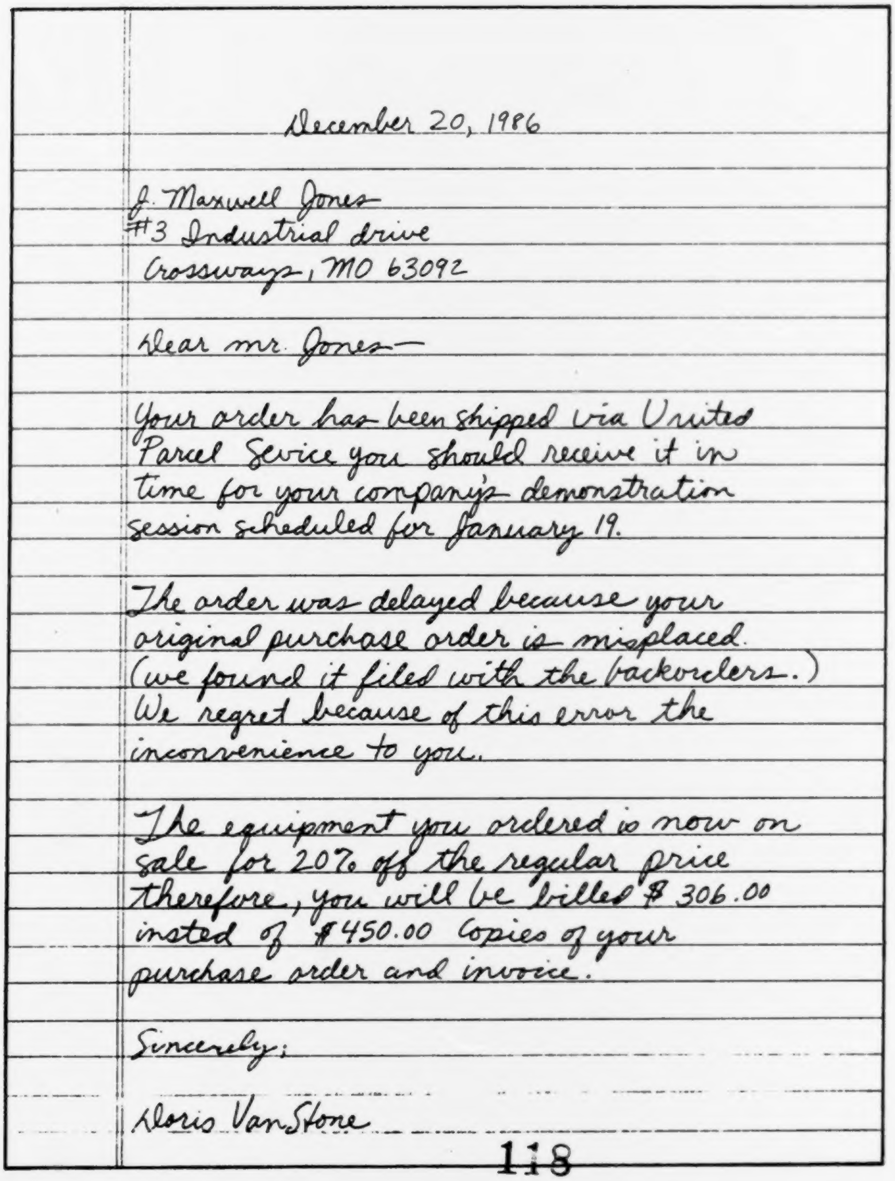
   ____________________

## F. Guidelines for Proofreading Letters

In order to insure that your typed letters are mailable, it is essential that they be proofread very carefully. Usually this will involve reading each letter three times, checking for certain tyoes of errors during each reading. The guidelines below explain each step in the proofreading process.

1. **First Reading** - Check the accuracy of all words and numbers. Common errors include:

- Misspelled words
- Capitalization errors
- Omitted letters
- Transposed (switched) letters
- Spacings
- Repeated letters
- Numeric copy



December 20, 1986

J. Maxwell Jones
#3 Industrial drive
Crossways, MO 63092

Dear mr. Jones—

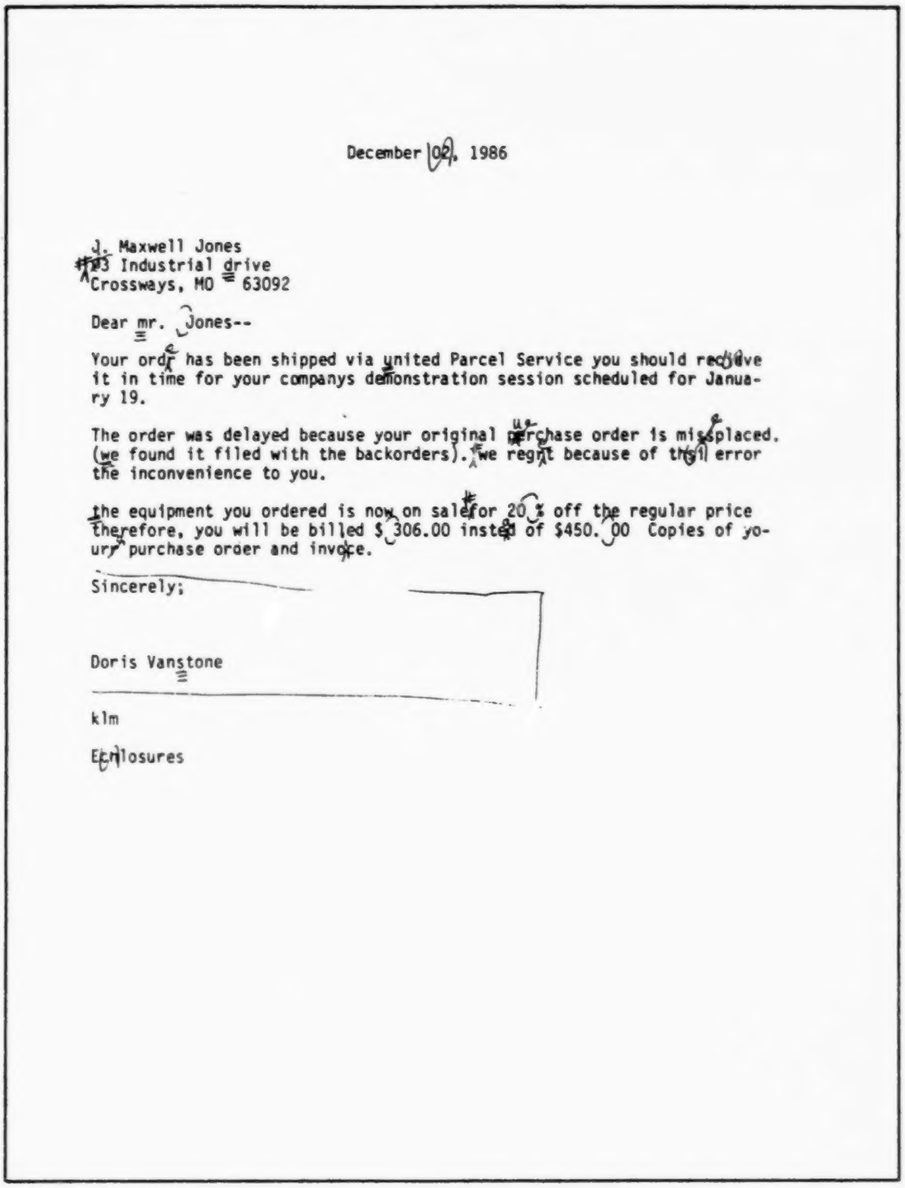
Your order has been shipped via United Parcel Sevice you should receive it in time for your company's demonstration session scheduled for January 19.

The order was delayed because your original purchase order is misplaced. (we found it filed with the backorders.) We regret because of this error the inconvenience to you.

The equipment you ordered is now on sale for 20% off the regular price therefore, you will be billed $ 306.00 insted of $450.00 Copies of your purchase order and invoice.

Sincerely;

Doris VanStone



December 02, 1986

J. Maxwell Jones
#23 Industrial drive
Crossways, MO 63092

Dear mr. Jones--

Your ordr has been shipped via united Parcel Service you should recieve it in time for your companys demonstration session scheduled for January 19.

The order was delayed because your original perchase order is misplaced. (we found it filed with the backorders). we regrt because of thsi error the inconvenience to you.

the equipment you ordered is now on salefor 20 % off the regular price therefore, you will be billed $ 306.00 insted of $450. 00 Copies of youry purchase oraer and invoce.

Sincerely;

Doris Vanstone

klm

Ecnlosures

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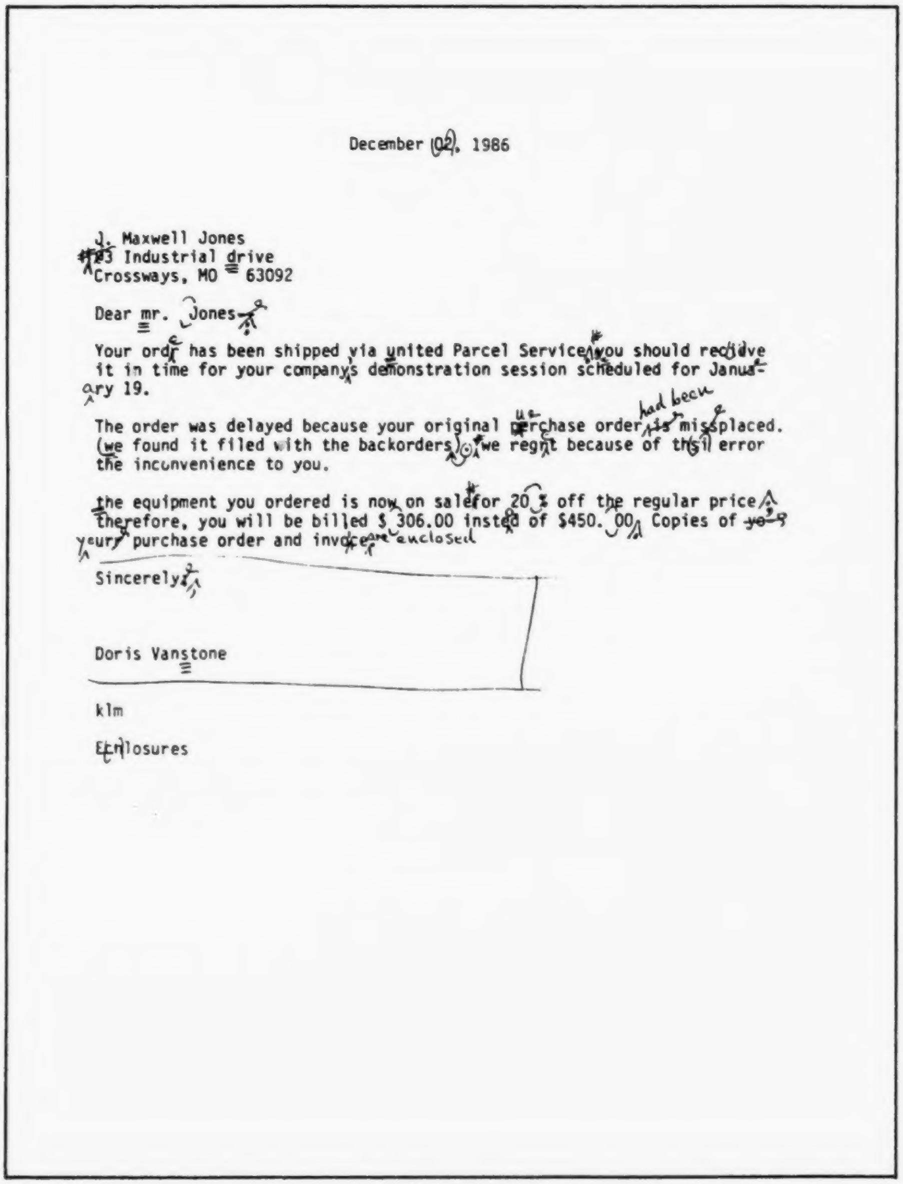
2. **Second Reading** - Check the letter again for errors in grammar. Look for errors in:

- Punctuation
- Grammar
- Incomplete sentences
- Incorrect word divisions.



December 02, 1986

J. Maxwell Jones
123 Industrial drive
Crossways, MO 63092

Dear mr. Jones

Your ordr has been shipped via united Parcel Service you should recieve it in time for your companys demonstration session scheduled for January 19.

The order was delayed because your original perchase order ~~is~~ had been missplaced. (we found it filed with the backorders) we regret because of thsi error the inconvenience to you.

the equipment you ordered is now on salefor 20 % off the regular price therefore, you will be billed $ 306.00 insted of $450. 00 Copies of ~~yo~~ yeur purchase order and invoce are enclosed

Sincerely

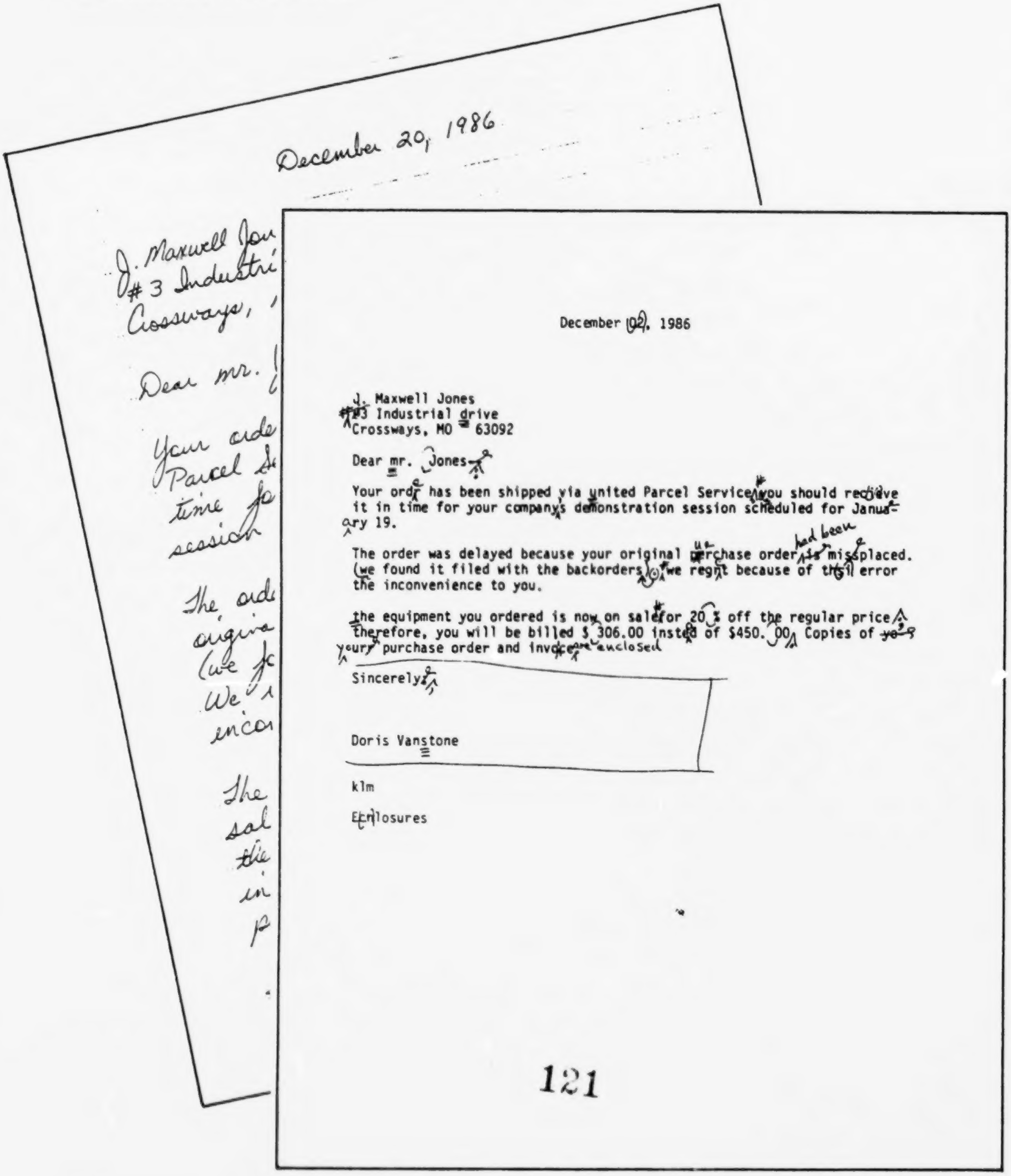
Doris Vanstone

klm

Enclosures

3. **Third Reading** - Check the letter for meaning. Be sure that:

   - Overall tone is positive
   - Statements make sense.



December 20, 1986

J. Maxwell Jon
#3 Industri
Crossways,

Dear mr.

Your orde
Parcel S
time fo
session

The orde
origina
(we fo
We r
incon

The
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the
in
p

---

December 02, 1986

J. Maxwell Jones
#3 Industrial drive
Crossways, MO 63092

Dear mr. Jones

Your ordr has been shipped via united Parcel Service you should recieve it in time for your companys demonstration session scheduled for Janury 19.

The order was delayed because your original perchase order had been ~~is~~ misplaced. (we found it filed with the backorders) we regrt because of this error the inconvenience to you.

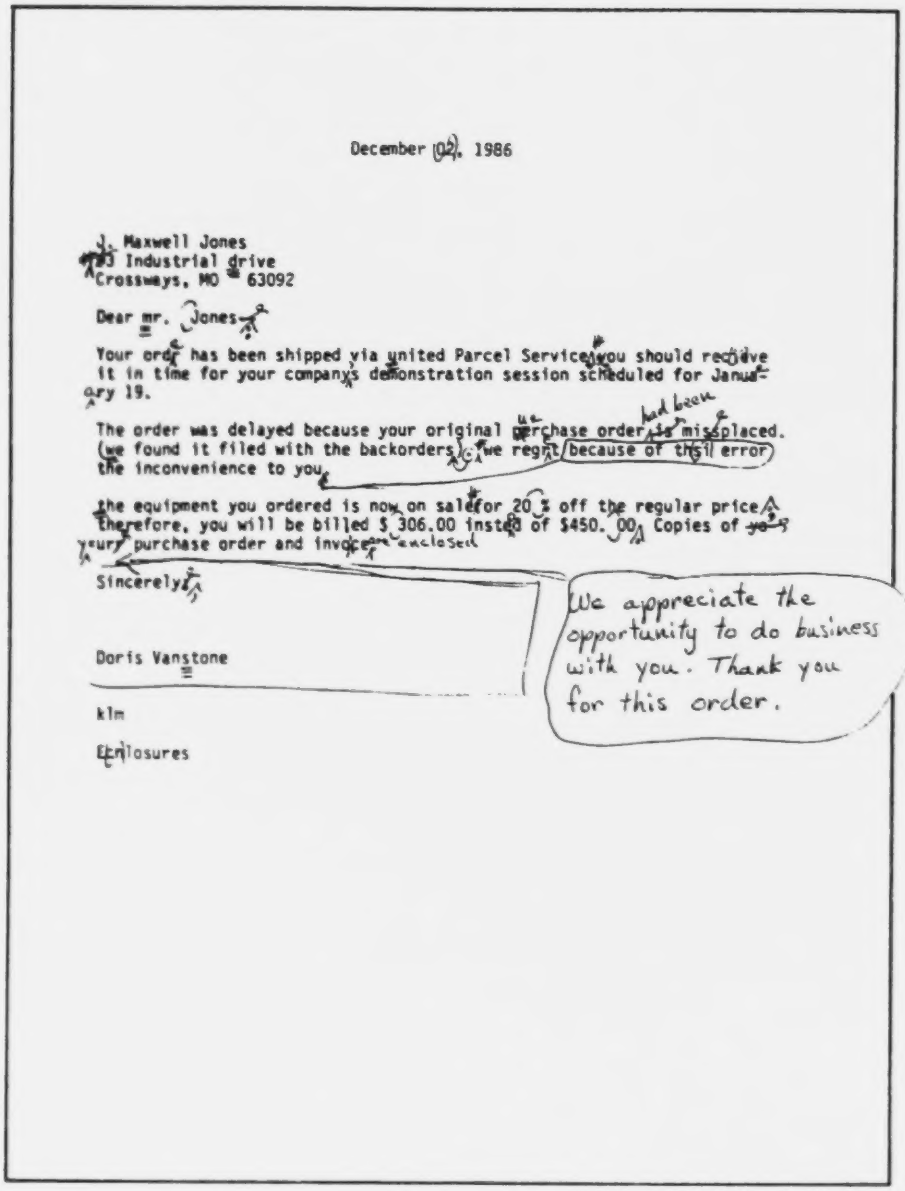
the equipment you ordered is now on salefor 20 % off the regular price therefore, you will be billed $ 306.00 insted of $450. 00 Copies of ~~yo~~ your purchase order and invoce are enclosed

Sincerely

Doris Vanstone

klm

Enclosures



December 02, 1986

J. Maxwell Jones
93 Industrial drive
Crossways, MO 63092

Dear mr. Jones

Your ord has been shipped via united Parcel Service you should recieve it in time for your companys demonstration session scheduled for January 19.

The order was delayed because your original perchase order ~~is~~ had been missplaced. (we found it filed with the backorders) we regret because of this error the inconvenience to you

the equipment you ordered is now on salefor 20 % off the regular price therefore, you will be billed $ 306.00 insted of $450. 00 Copies of ~~yo~~ your purchase order and invoce are enclosed

Sincerely

Doris Vanstone

klm

Enclosures

We appreciate the opportunity to do business with you. Thank you for this order.

## DO SKILL SHEET 6

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## Proofreading
# Skill Sheet 6

Directions: Follow the steps of procedure for proofreading letters as you check this typed letter against the writer's original copy. You may wish to use references to aid you in checking spelling and grammar.

1. During the **first reading**, use a **blue ink pen** to place the proofreaders' marks in the correct places. Check for:
   - Spelling and typing errors
   - Verify the data and dates

2. During the **second reading**, add proofreaders' marks with a **No. 2 pencil.** Check for:
   - Grammar
   - Punctuation
   - Complete sentences

3. During the **third reading**, add proofreaders' marks with a **black pen.** Check to see that:
   - Overall tone of the letter is positive
   - Letter makes sense

# Proofreading
# Skill Sheet 6
## Writer's Original Copy

February 10, 1986

Dear Customer:

We are pleased to announce that we will be having a sale beginning April 3.

Please give special attention to the enclosed map. The sale location will be the Colonial Inn Convention Hall at I-55 and Route B, Cape Girardeau, Missouri.

We will have a large selection of home furnishings, as well as a large selection of sporting equipment.

Enclosed are tickets for our private sale days.

Two Private Sale Days

Monday, March 3 and Tuesday, March 4

Four Private Sale Days

Wednesday, March 5; Thursday, March 6, Friday, March 7, and Saturday, March 8.

Store Hours

| | | |
|---|---|---|
| Monday | March 3 | 8 a.m. to 8 p.m. |
| Tuesday | March 4 | 8 a.m. to 8 p.m. |
| Wednesday | March 5 | 10 a.m. to 8 p.m. |
| Thursday | March 6 | 10 a.m. to 8 p.m. |
| Friday | March 7 | 10 a.m. to 8 p.m. |
| Saturday | March 8 | 10 a.m. to 5 p.m. |

We look forward to seeing you again.

Sincerely,

Frank Hayes

Enclosures

# Proofreading
# Skill Sheet 6
## Typed Letter

February 10, 1896

Dear Customer:

We are pleased to announce that we will be having a sale beginning April 3.

Please give special attnetion to the enclosed map. The sale location will be the Colonial Inn Convention hall at I-55 and Route B, Cape Girardeau, MO.

We will have e large selection of home furnishings, as well as a large selection of sporting equipment

Enclosed are tickets for our private sale days.

Two Private Sale Days

Mon., March 3 and Tues., March 4

Four Public Sales Days
Wed., March 5; Thurs. March 6, Fri., March 7, & Saturday, March 8

Store Hours

| | | |
|---|---|---|
| Monday | March 3 | 8 a.m. to 8 a.m. |
| Tuesday | March 4 | 8 a.m. to 8 p.m. |
| Wednesday | March 5 | 10 a.m. to 8 p.m. |
| Thursday | March 6 | 10 a.m. to 8 p.m. |
| Friday | March 6 | 10 a.m. to 8 p.m. |
| Saturday | March 8 | 10 a.m. to 5 p.m. |

We look forward to seeing you again.

Sincerely,

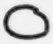
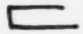
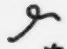
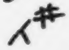
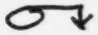
Frank Hayes

cmr

Enclsures

# Proofreading
# Unit Review

Directions: For each symbol in Column 1, choose the correct definition from Column 2. Write the correct letter in the spaces provided.

| | | Column 1 | Column 2 |
|---|---|---|---|
| ________ | 1. |  | A. move to the left |
| ________ | 2. |  | B. leave space |
| ________ | 3. |  | C. delete |
| ________ | 4. |  | D. spell out in full |
| ________ | 5. |  | E. insert punctuation |
| ________ | 6. | | F. move circled material to indicated point |

Directions: Proofread the following expressions for correct punctuation and symbol usage. If the expressions are correct, enter a "C" in the space provided. If the expressions are incorrect, place proofreaders' marks at the appropriate places.

7. If you are in a hurry, just drop the card in the mail today. _____
8. Accordingly we have updated the ledgers. _____
9. Therefore, the tickets were printed yesterday. _____
10. It has child - proof hinges. _____
11. Your ideas increased our sales by 20%. _____
12. You will hear a "beep". _____
13. Just call our branch at 314 552-1441. _____
14. For as little as $30.00 a day, you can rent a lodge. _____

Directions: Place proofreaders' marks in the following letter.

May 7, 1986

The Office Place
558 Poplar Avenue
Poplar Bluff, MO 63901

Dear Bill,

Please send the following products by UPS.

| Quanity | Catalog No. | Description | Price | Total |
|---|---|---|---|---|
| 6 | B18-523 | letter-size desk tray | $2.50 ea. | $15.00 |
| 2 | B180524 | legal-size desk tary | $4.25 ea. | 8.50 |

To cover the costs of shipping and handling my check for $25.23 is enclosed.

Sincerly,

Henry Langford

# Proofreading
# Performance Checklist

Student ______________________ has successfully performed the following steps of procedure.

| Proofreading Tasks | Yes | No | Comments |
|---|---|---|---|
| 1. Interpreted proofreaders' marks | | | |
| 2. Used special keys correctly | | | |
| 3. Used correct spacing with special keys | | | |
| 4. Proofread numeric copy by comparing numbers with original | | | |
| 5. Proofread numeric copy by checking for: | | | |
| misplaced decimal points | | | |
| misaligned numbers | | | |
| transposed figures | | | |
| wrong numbers | | | |
| wrong symbols | | | |
| 6. Verified computations in numeric copy | | | |
| 7. Used references appropriately: | | | |
| used dictionary | | | |
| used word book | | | |
| used grammar/style handbook | | | |
| 8. Proofread a letter, checking for: | | | |
| misspelled words | | | |
| capitalization errors | | | |
| omitted letters | | | |
| transposed letters | | | |
| correct spacing | | | |
| repeated letters | | | |
| 9. Verified data and dates in letters | | | |
| 10. Checked letter second time for: | | | |
| grammar | | | |
| punctuation errors | | | |
| complete sentences | | | |
| word divisions | | | |
| 11. Proofread letter third time for: | | | |
| overall positive tone | | | |
| meaningful statements | | | |

Satisfactory - Should Move On ☐
Repeat This Unit ☐

______________________ Student Signature/Date

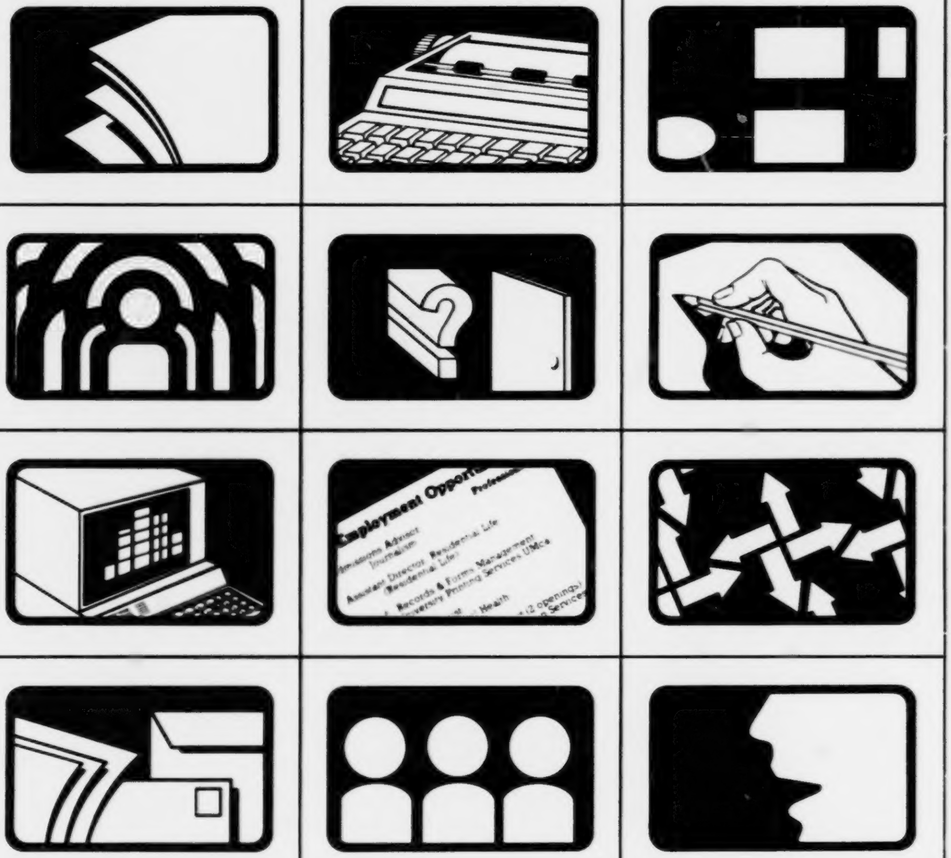
______________________ Instructor Signature/Date

SN-92-S

SUPPLEMENTARY UNITS FOR
SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

# Typing Letters

Unit 3



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# Typing Letters
# Introduction

Millions of letters, memos, and other forms of business correspondence are mailed each year. An office worker's ability to produce mailable correspondence rapidly is, therefore, a very important skill.

This unit provides information about correcting errors, provides a review of margin settings, and shows techniques for estimating the length of business letters.

---

## Unit Objectives

After completion of this unit, you should be able to demonstrate skills needed when producing business letters.

## Specific Objectives

After completion of this unit, you should be able to:

1. Estimate the length of the body of a handwritten letter.
2. Estimate the length of the body of a taped letter.
3. Determine appropriate margin settings.
4. Plan the correction of errors using techniques of cover-up, lift off, and delete.

---

## Are You Ready?

Check the statement which is true for you.

☐

I want to study the information in this unit before doing the Performance Checklist.

**TURN THE PAGE AND BEGIN**

☐

I can do the tasks and I am ready to do the Performance Checklist.

**SEE YOUR INSTRUCTOR**

## A. Terms and Equipment for Typing Letters

### Terms

1. Average letter - letter whose body contains a word count of between 101 and 300 words

2. Code key - a key such as "CONTROL" which must be held down when striking another key to perform a specific function

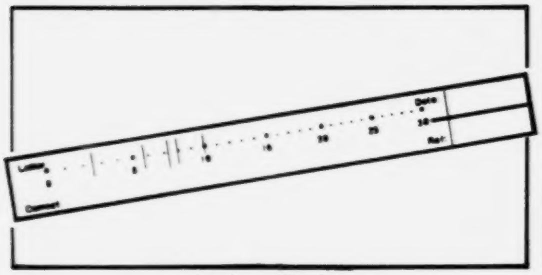
3. Long letter - letter whose body contains a word count of more than 300 words (Sometimes a second page of paper is needed.)

4. Position Indicator - a pointer, lighted bar, or cursor which helps you to know where you are horizontally on a page

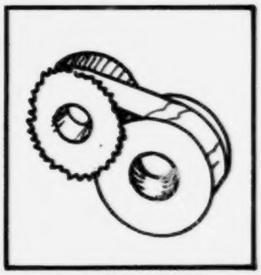
5. Short letter - letter whose body contains up to 100 standard words

6. Standard word - a set of five letters, spaces, numbers, or symbols (Word count in the body of a letter is figured in this manner: All strokes in the paragraph are counted, added together, then divided by 5.)

### Equipment


Index Strip

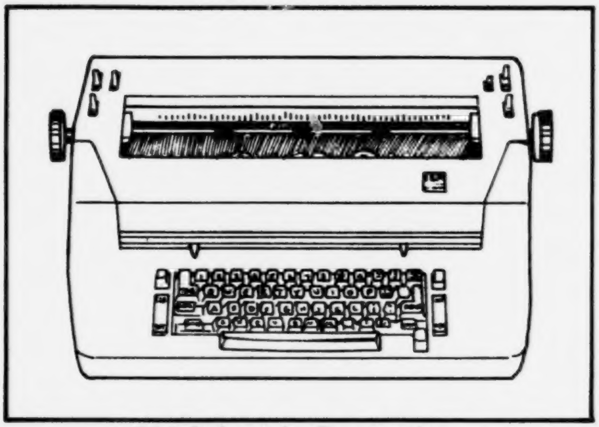
Cover-Up Tape


Lift Off Ribbon

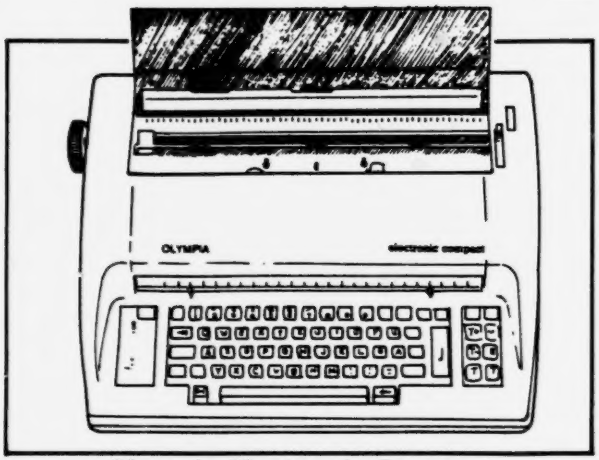
Correction Fluid

Correction Tape

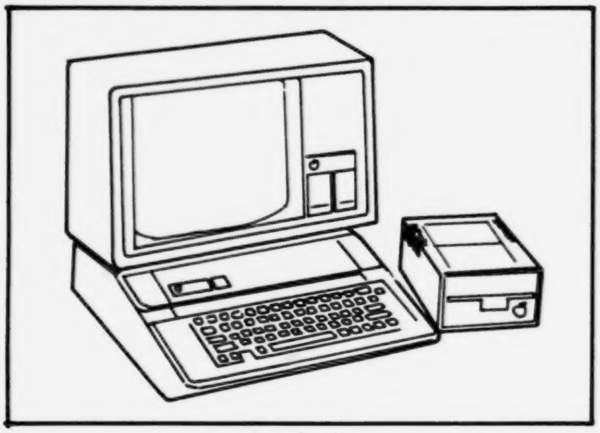
Lift Off Tape



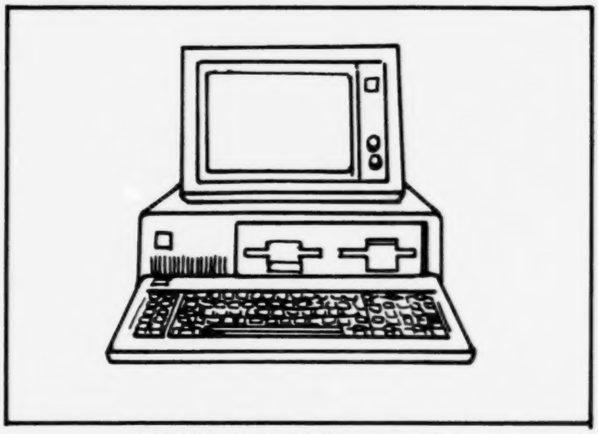
IBM Selectric Typewriter



Olympia Electronic Compact



Apple IIe



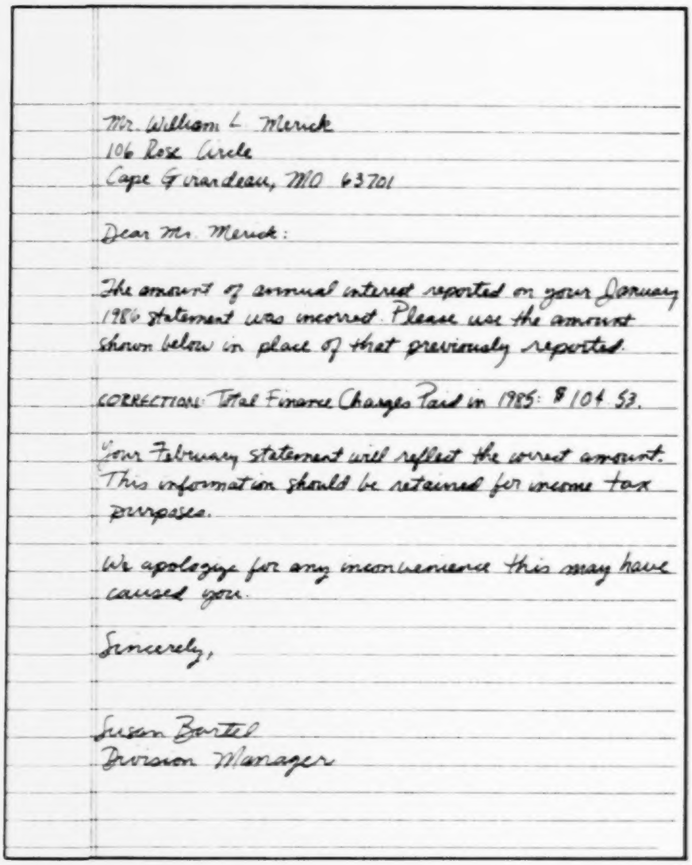
IBM Personal Computer

## B. Steps for Estimating the Length of a Letter

Learning to estimate the length of a letter helps in determining margin settings and may save retyping/reprinting. Refer to the following letter (Letter A) as you follow the steps for estimating the length of a handwritten letter.

1. Count the number of words in the first full line of the body of the letter. (Letter A shows nine words in the first line.)
2. Count the number of lines of handwriting in the body of the letter. (Letter A shows nine lines of handwriting.)
3. Multiply the words per line times the number of lines. (Letter A shows 9 x 9 or 81 words.)
4. Since Letter A contains approximately 81 words, margin settings for short letters should be used.

Letter A



Mr. William L. Merick
106 Rose Circle
Cape Girardeau, MO 63701

Dear Mr. Merick:

The amount of annual interest reported on your January 1986 statement was incorrect. Please use the amount shown below in place of that previously reported.

CORRECTION: Total Finance Charges Paid in 1985: $104.53.

Your February statement will reflect the correct amount. This information should be retained for income tax purposes.

We apologize for any inconvenience this may have caused you.

Sincerely,

Susan Bartel
Division Manager

Margin Settings **(NOTE:** LM - Left Margin; RM - Right Margin)

| Word Count in Body | 12 Pitch | | 10 Pitch | |
|---|---|---|---|---|
| Up to 100 Words (Short) | LM25 | RM80 | LM22 | RM67 |
| 101 to 300 Words (Average) | LM20 | RM85 | LM17 | RM72 |
| 301 or More Words (Long) | LM15 | RM90 | LM12 | RM77 |

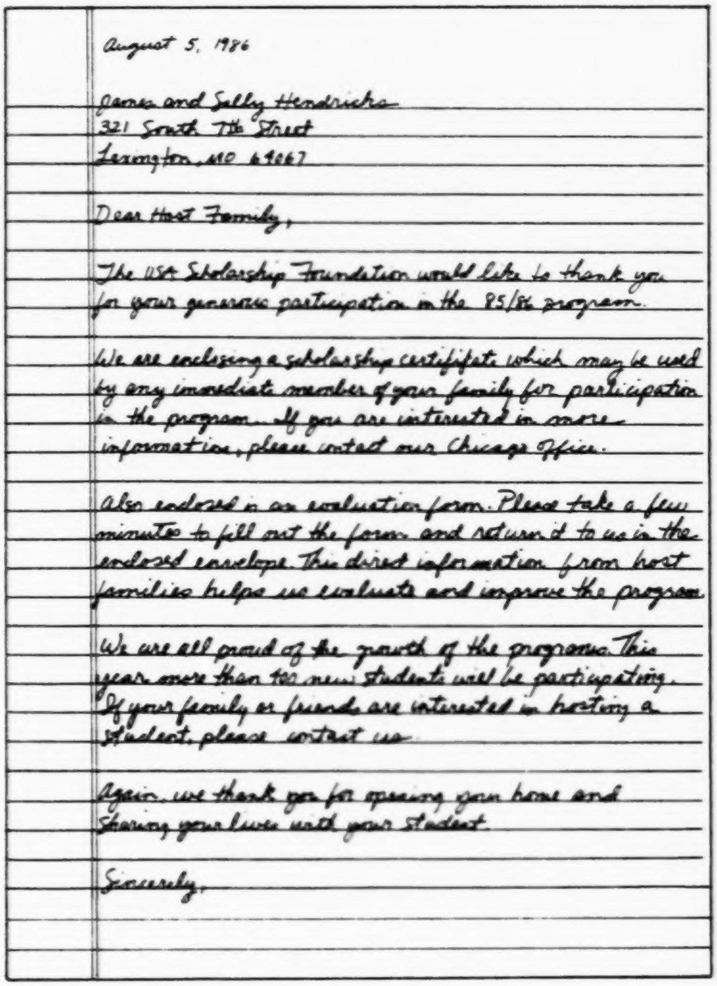
**DO SKILL SHEET 1**

## Typing Letters
# Skill Sheet 1

**Directions:** Study each letter and answer the questions about it.

1. How many words are shown in the first line of the body of Letter B? ________
2. How many lines of handwriting are shown in the body of Letter B? ________
3. Multiply the answers from questions 1 and 2 to find the number of words in the body of Letter B. ________
4. Margin settings to be used for Letter B are those of ____.
   a. a short letter
   b. an average letter
   c. a long letter

Letter B



August 5, 1986

James and Sally Hendricks
321 South 7th Street
Lexington, MO 64067

Dear Host Family,

The USA Scholarship Foundation would like to thank you
for your generous participation in the 85/86 program.

We are enclosing a scholarship certificate which may be used
by any immediate member of your family for participation
in the program. If you are interested in more
information, please contact our Chicago Office.

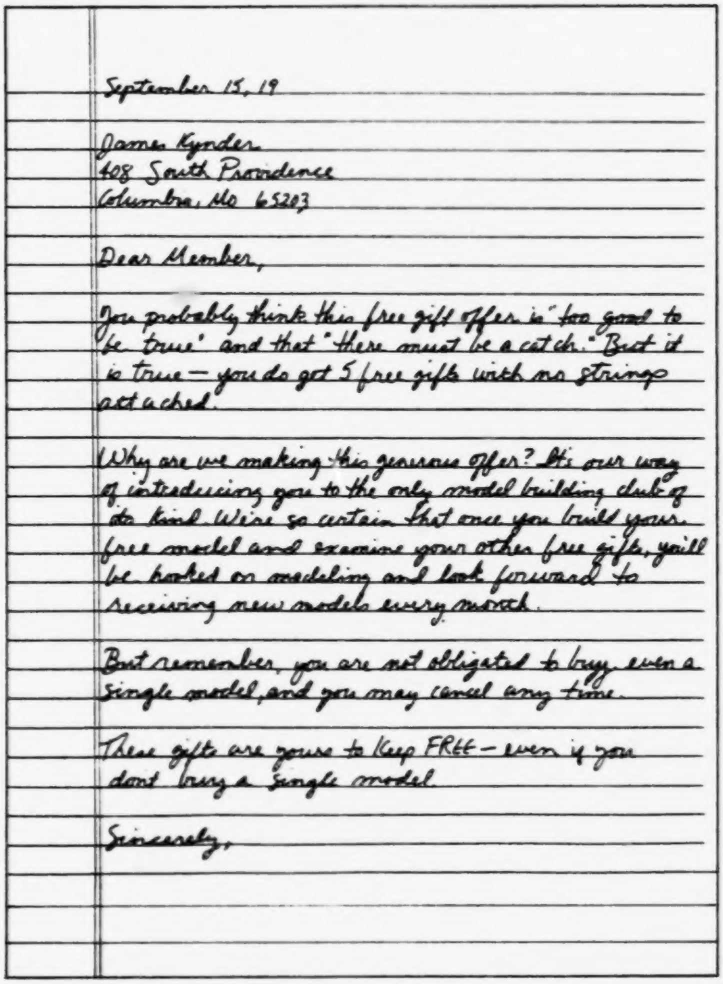
Also enclosed is an evaluation form. Please take a few
minutes to fill out the form and return it to us in the
enclosed envelope. This direct information from host
families helps us evaluate and improve the program.

We are all proud of the growth of the programs. This
year more than 100 new students will be participating.
If your family or friends are interested in hosting a
student, please contact us.

Again, we thank you for opening your home and
sharing your lives with your student.

Sincerely,

Letter C



September 15, 19

James Kynder
408 South Providence
Columbia, Mo 65203

Dear Member,

You probably think this free gift offer is "too good to
be true" and that "there must be a catch." But it
is true — you do get 5 free gifts with no strings
attached.

Why are we making this generous offer? It's our way
of introducing you to the only model building club of
its kind. We're so certain that once you build your
free model and examine your other free gifts, you'll
be hooked on modeling and look forward to
receiving new models every month.

But remember, you are not obligated to buy even a
single model, and you may cancel any time.

These gifts are yours to keep FREE — even if you
dont buy a single model.

Sincerely,

5. How many words are shown in the first line of the body of Letter C? ________

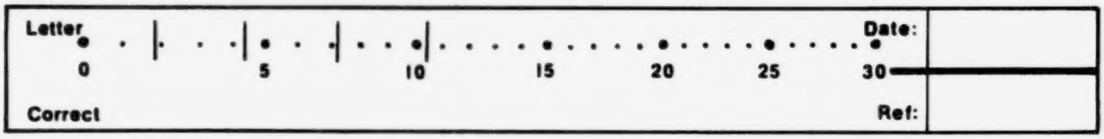
6. How many lines of handwriting are shown in the body of Letter C? ________

7. Multiply the answers of questions 5 and 6 to find the number of words in the body of Letter C. ________

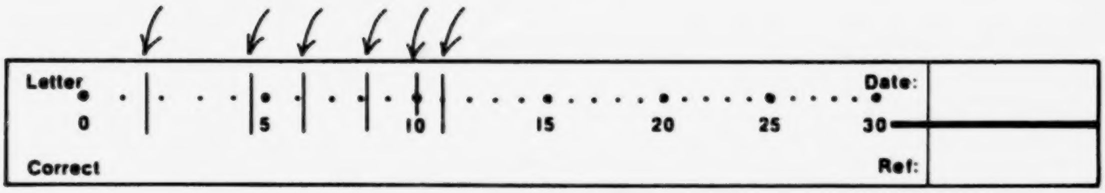
8. Margin settings to be used for Letter C are those of ________.
   a. a short letter
   b. an average letter
   c. a long letter

## C. Steps for Estimating the Length of Taped Correspondence

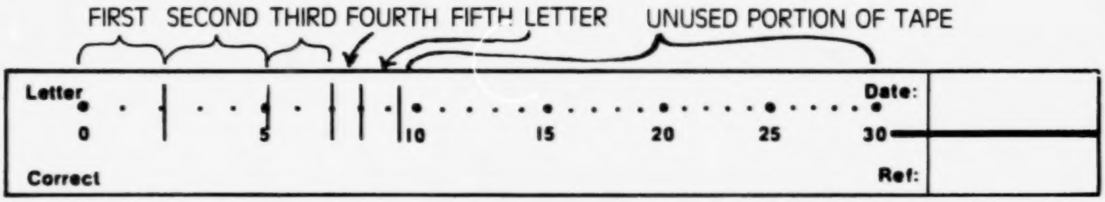
1. Obtain the index strip which accompanies the tape to be transcribed.



2. Look for the marks which indicate the end of dictation for individual pieces of correspondence.



3. Determine the amount of time used to dictate correspondence. For example, the index strip shown here indicates that the first letter took two minutes to be dictated; the second letter, three minutes; the third letter, two minutes; the fourth letter, one minute; and the fifth letter, about a minute and a half. The remainder of the tape was not used.



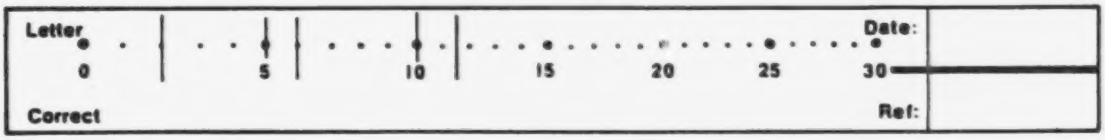
4. Apply these guidelines to determine margin settings.

| Length of Time | Use Margin Settings For | Margin Settings<br>12 Pitch | Margin Settings<br>10 Pitch |
|---|---|---|---|
| Up to 1 Minute | Short Letters | LM25 RM80 | LM22 RM67 |
| 1 to 3 Minutes | Average Letters | LM20 RM85 | LM17 RM72 |
| More than 3 Minutes | Long Letters | LM15 RM90 | LM12 RM77 |

**DO SKILL SHEET 2**

# Typing Letters
## Skill Sheet 2

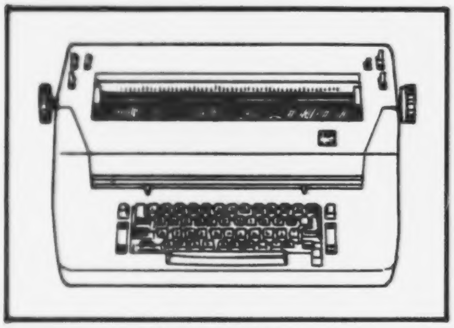
**Directions:** Study the index strip below and circle the appropriate type of margin setting for each letter.



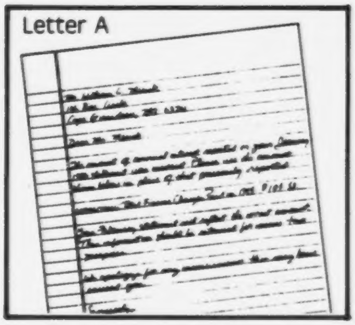
1. first letter.......................................short average long
2. second letter.......................................short average long
3. third letter.......................................short average long
4. fourth letter.......................................short average long
5. fifth letter.......................................short average long

## D. Steps for Setting Letter Margins

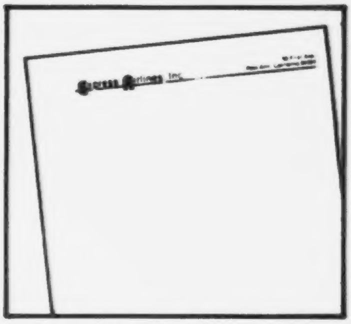
1. Assemble equipment.



Typewriter



Typing Assignment



Stationery

**To determine the margin settings for letters. . .**

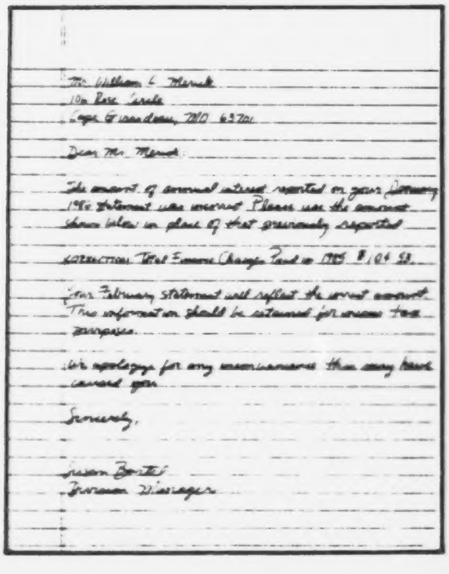
2. Study the placement table shown here.

| | | Margin Settings | |
|---|---|---|---|
| | **Word Count in Body** | **12 Pitch** | **10 Pitch** |
| Short letter: | Up to 100 Words | LM25 RM80 | LM22 RM67 |
| Average letter: | 101 to 300 Words | LM20 RM85 | LM17 RM72 |
| Long letter: | More than 301 Words | LM15 RM90 | LM12 RM77 |

**NOTE:** LM is left margin, RM is right margin.

3. Estimate whether the letter is short, average, or long by counting the number of words in the first line and multiplying that number by the number of lines in the body of the letter.

Letter A



Mr. William L. Merck
10[illegible] Rose Circle
Cape Girardeau, MO 63701

Dear Mr. Merck:

The amount of annual interest reported on your January 1986 statement was incorrect. Please use the amount shown below in place of that previously reported.

CORRECTION: Total Finance Charges Paid in 1985 $[illegible]

Your February statement will reflect the correct amount. This information should be retained for income tax purposes.

We apologize for any inconvenience this may have caused you.

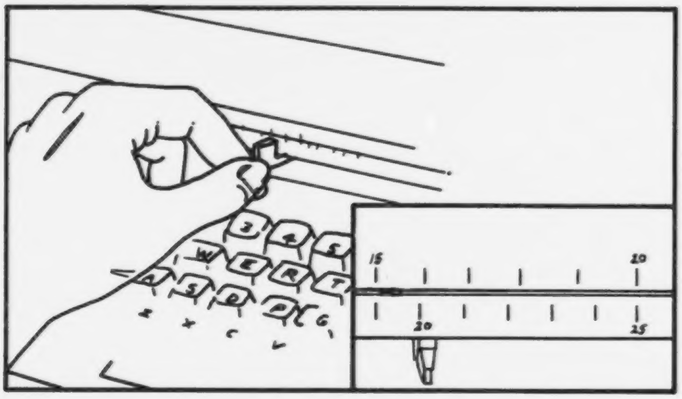
Sincerely,

Susan Bartel
Division Manager

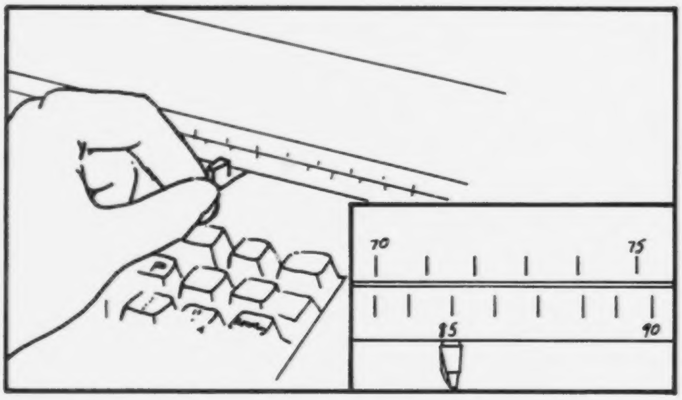
4. Procedures for setting margins vary, depending upon the type of equipment used. Illustrations for four brands of equipment are shown on the following pages.

**To set margins on the IBM Selectric. . .**

1. Press in gently on the left margin stop and slide it to the number indicated on the margin pitch scale.

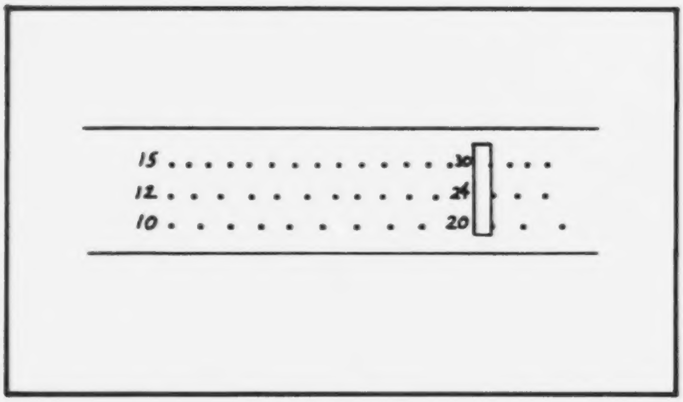


2. Gently press in on the right margin stop and slide it to the number indicated on the margin pitch scale.

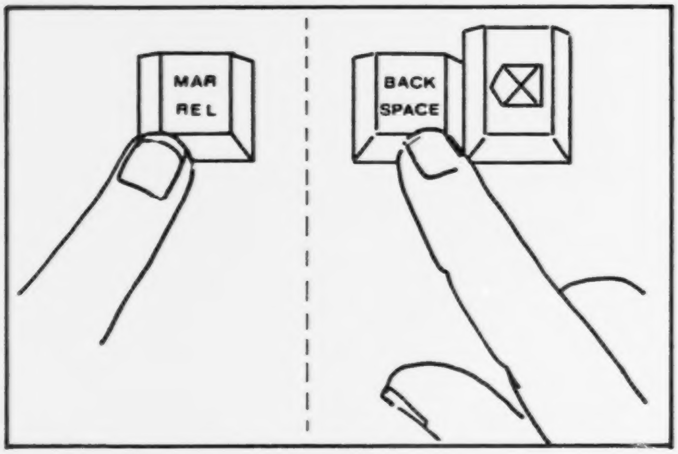


**To set margins on the Olympia Electronic Compact. . .**

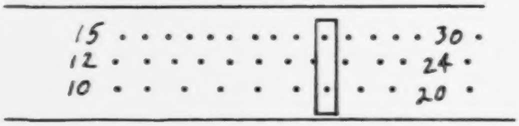
1. When the motor is turned on, the indicator moves to the preset left margin of 24 for 12 pitch.



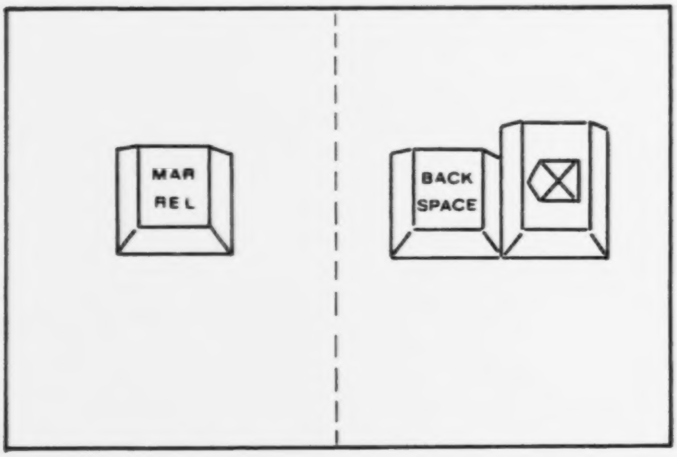
2. If a different setting is needed, press the margin release key and hold it down while the backspace key is pressed.



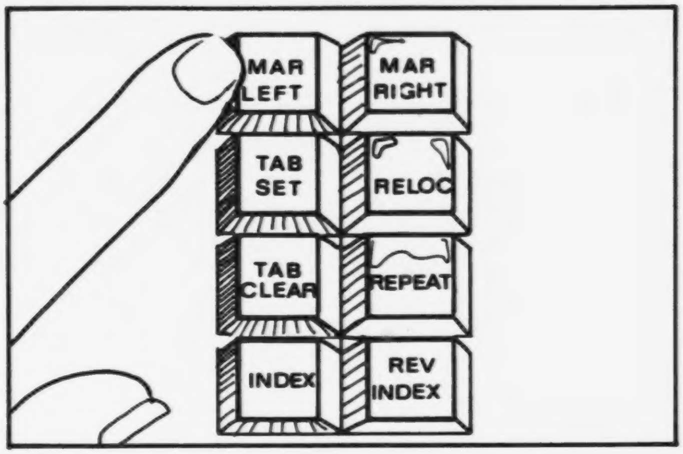
3. Backspace to the desired number on the margin pitch scale.



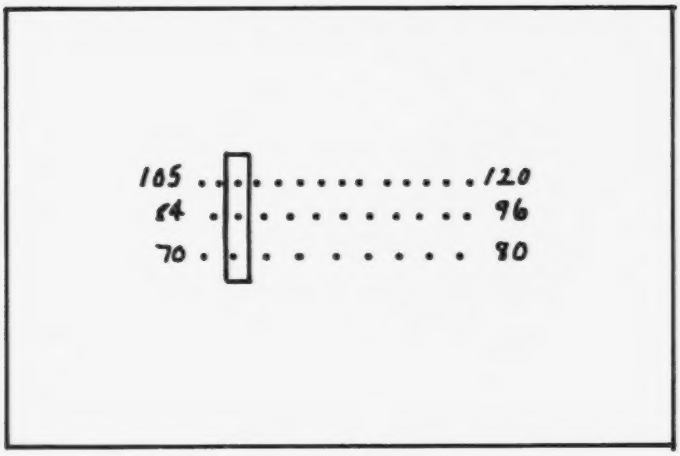
4. Release these keys.



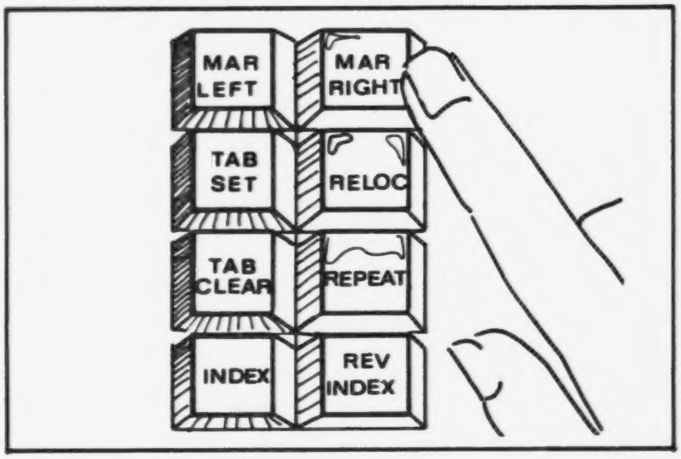
5. Press the "Mar Left" key.



6. To set right margin, space forward until the indicator is on the number desired for the right margin.



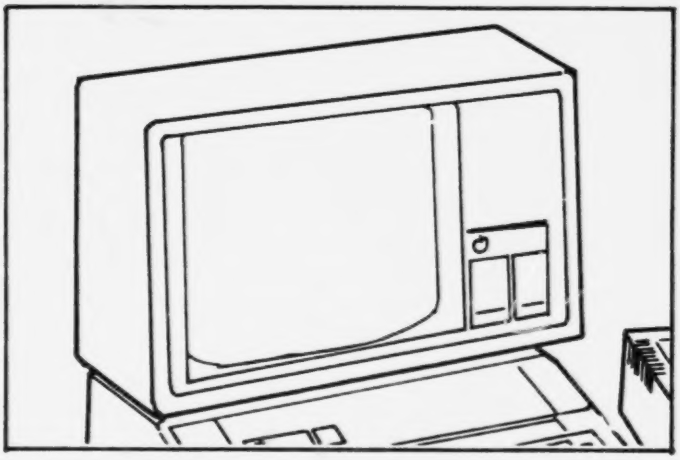
7. Press the "Mar Right" key.



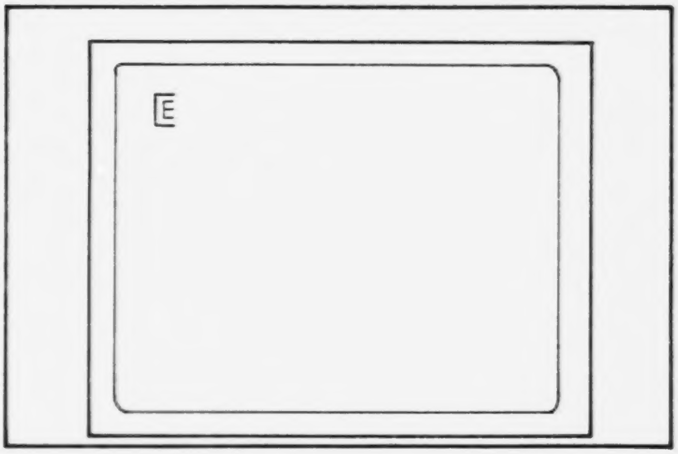
**To set margins on the Apple IIe, Applewriter program. . .**

1. Type the following commands before typing the letter:

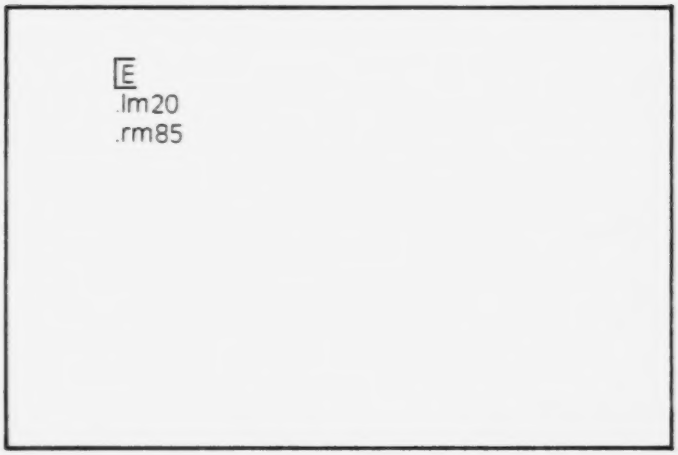
   Control V
   Escape
   Shift E
   Control V
   Return



2. You will then see E on your screen.



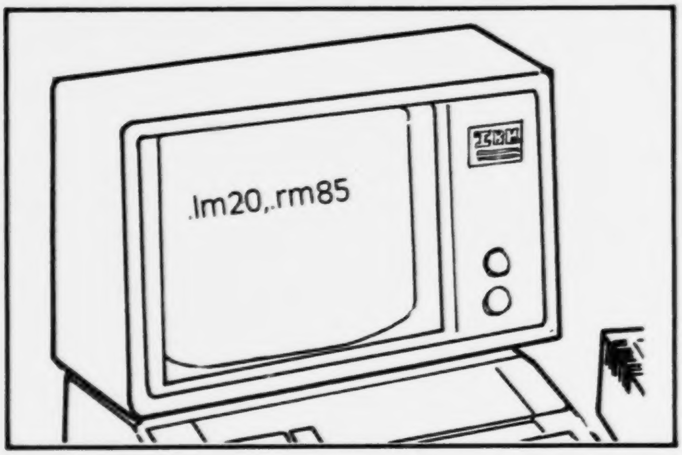
3. Type these margin commands:
   .lm 20
   .rm 85



```
E
.lm20
.rm85
```

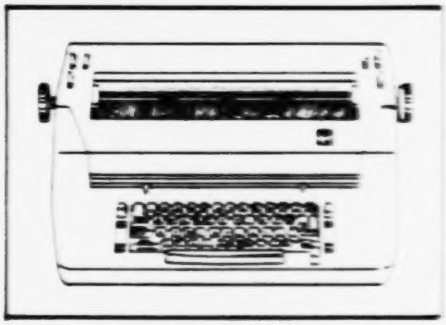
**To set margins on the IBM PC, Peachtext program. . .**

Type the following command:
.lm 20, .rm 85



## E. Steps for Correcting Typing Errors Using Techniques of Cover-up, Lift Off, and Delete

1. Assemble equipment



Typewriter

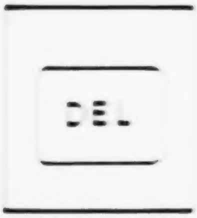
Cover-up Tape

Lift Off Tape

Correction Fluid

Correction Tape

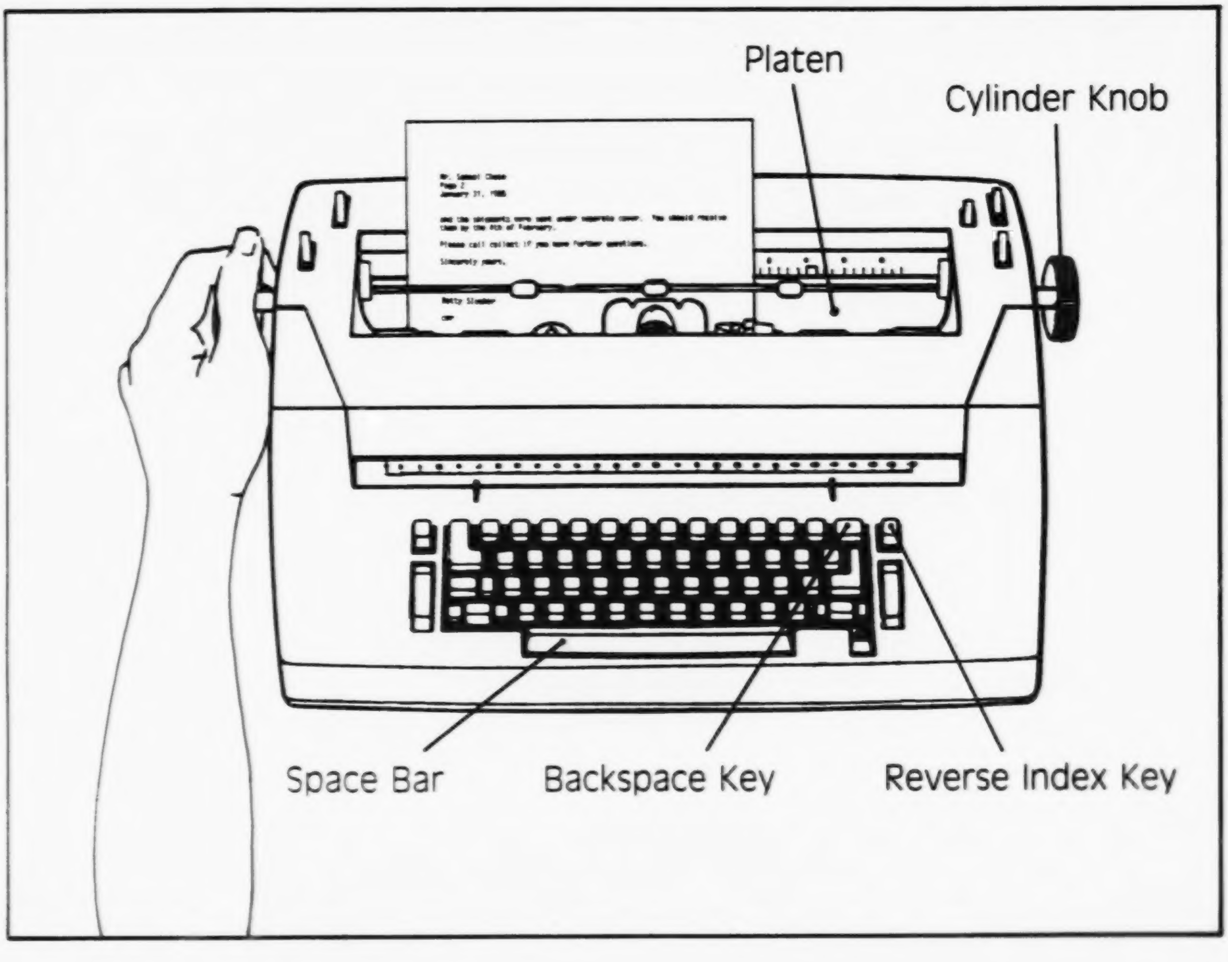
Word Processor/Monitor



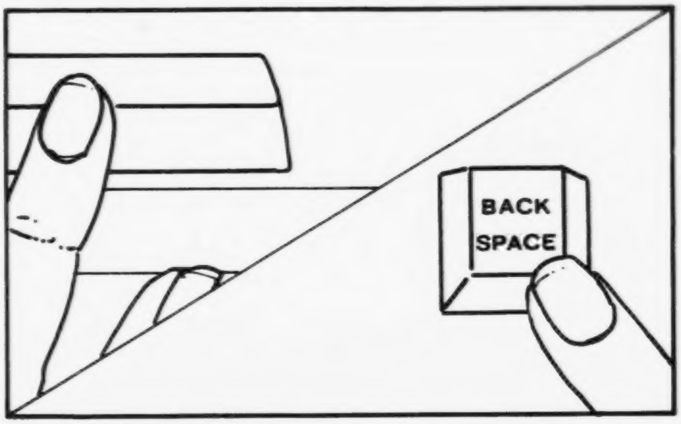
Delete Key

### To correct errors by using cover-up tape or lift off tape. . .

1. Using the cylinder knob or reverse index key, turn the platen to the line that contains the error.

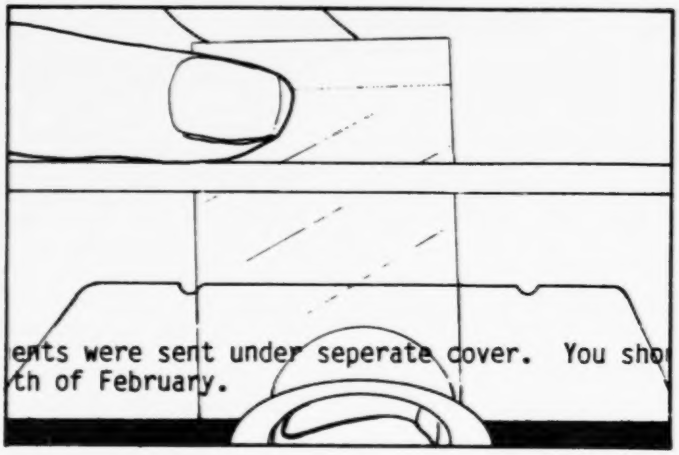


2. Use the space bar, the express backspace key, or the backspace key to help in locating the error.

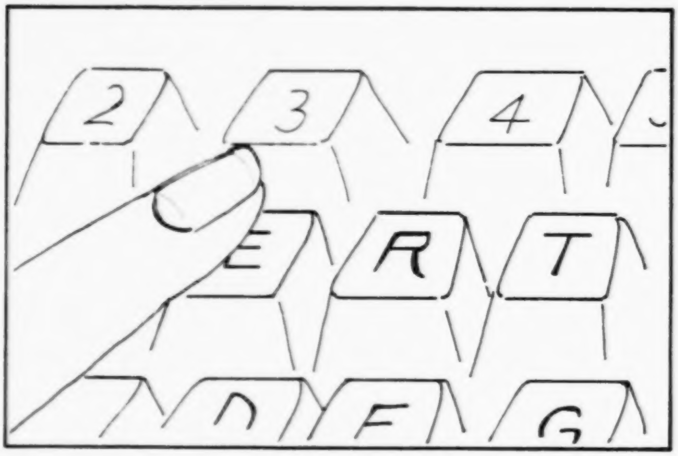


3. Insert the cover-up tape or lift-off tape behind the typewriter ribbon and in front of the typing paper.

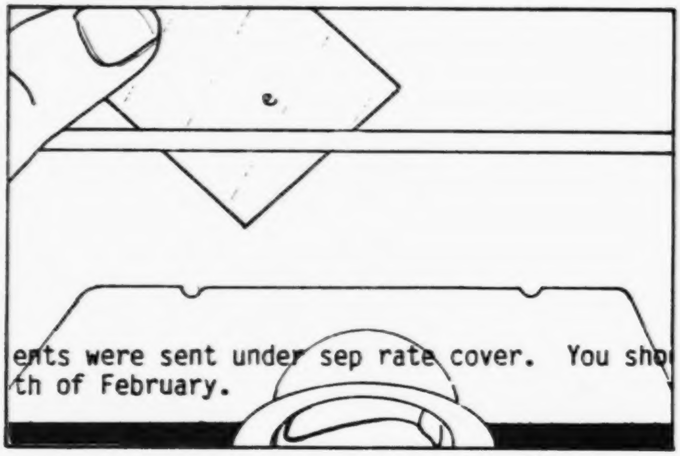
   **NOTE:** In this example *seperate* should be *separate*.


ents were sent under seperate cover. You sho
th of February.

4. Hold on to the tape with one hand as you type the incorrect key again.
   **NOTE:** Do not allow the tape to fall into the typewriter.



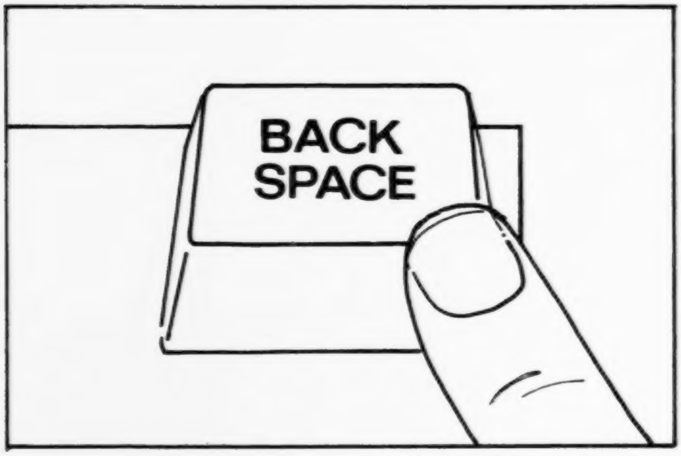
5. Take out the cover-up tape or lift-off tape.


e
ents were sent under sep rate cover. You sho
th of February.

6. Check to see if the error is blotted out completely or has been lifted off completely. If not, repeat the procedure.

sep rate

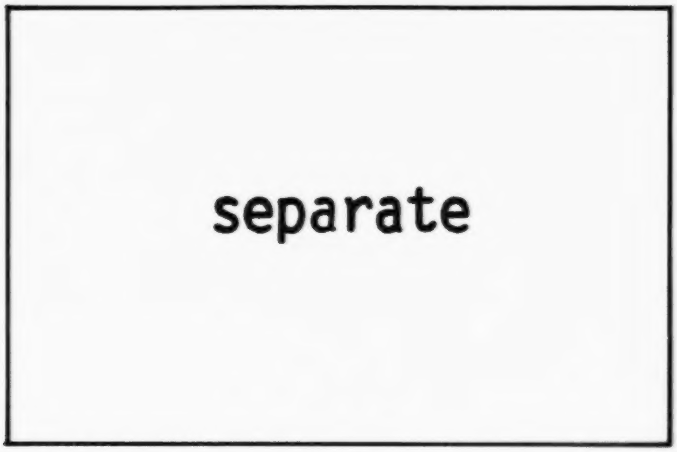
7. Backspace once.



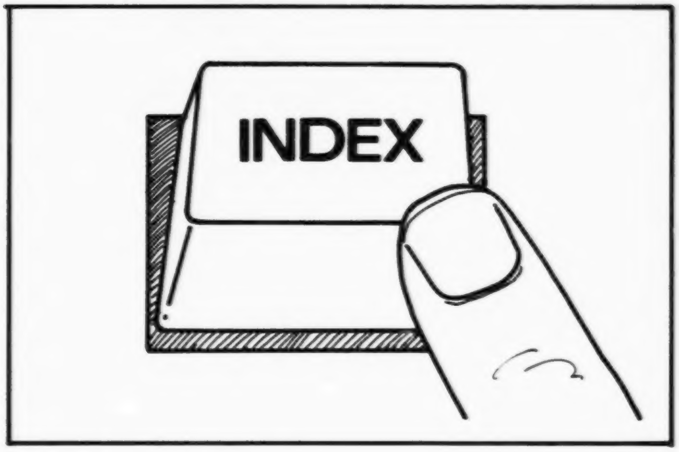
8. Strike the correct key.

separate

9. Backspace and strike the correct key again if necessary to make the type as dark as the other letters.



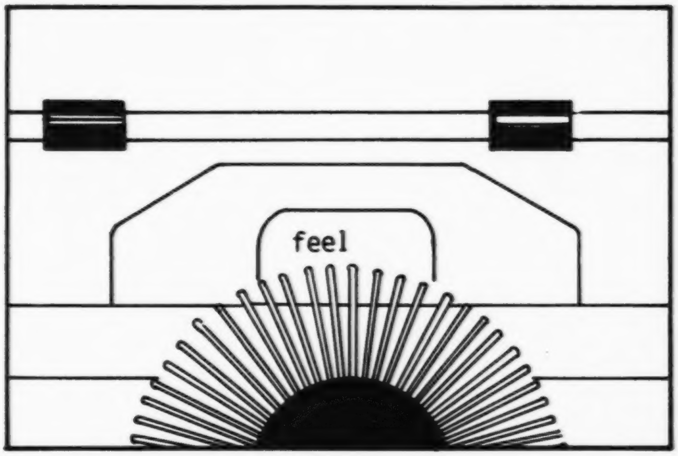
10. Press the space bar and the index key or the return key, if necessary, to locate the point from which to continue typing.



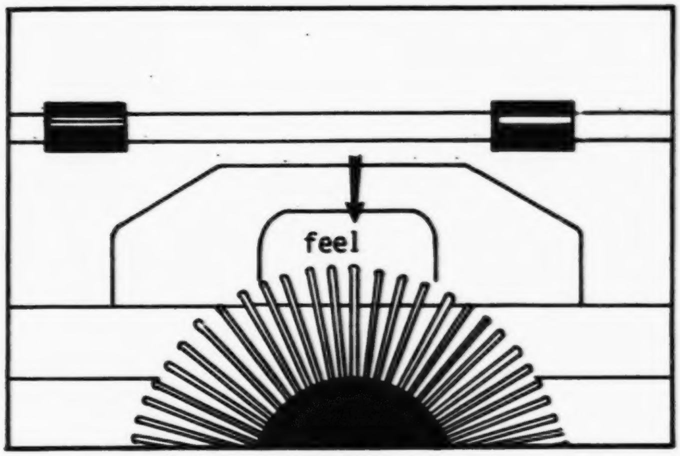
### To use the lift off ribbon to correct errors. . .

1. Stop typing as soon as you realize an error has been made.

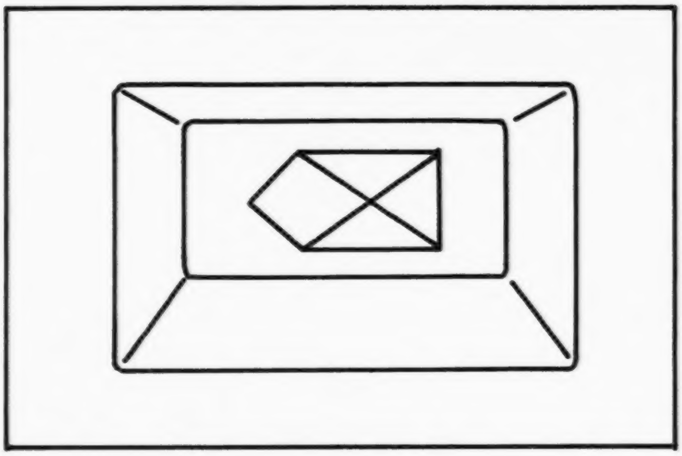
   **NOTE:** In this example, "feel" should have been typed "fell."



2. Backspace to the letter just to the RIGHT of the error.

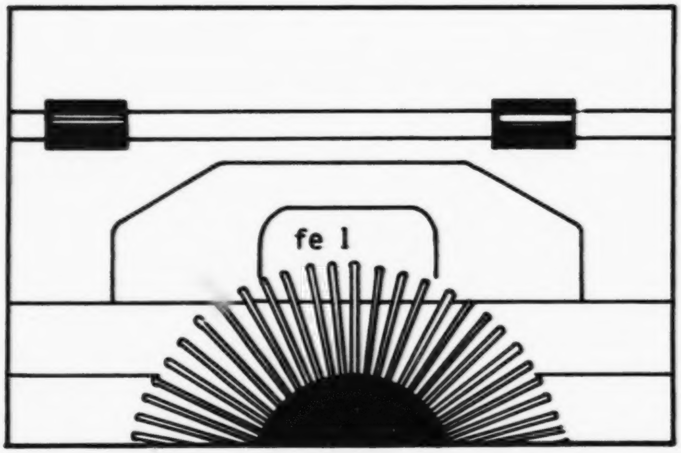


3. Press the correction key.

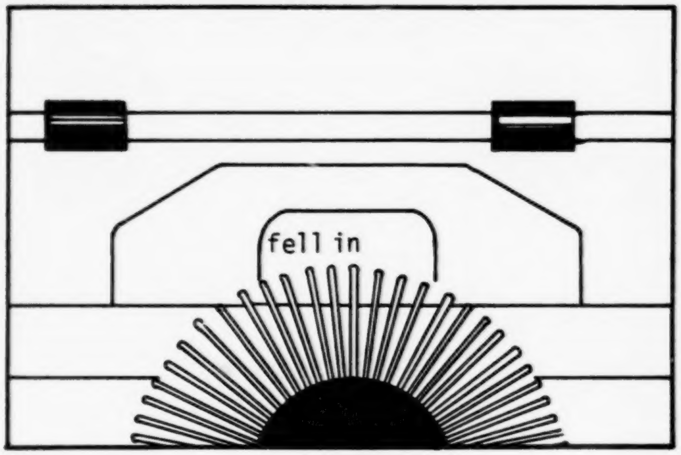


4. Type the incorrect letter. The lift off ribbon pulls the incorrect letter off the page and the typewriter stays on that space.

   **NOTE:** **Some typewriters have a memory and will automatically type the incorrect letter as soon as the correction key is typed.**

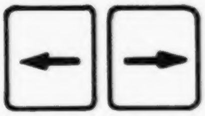


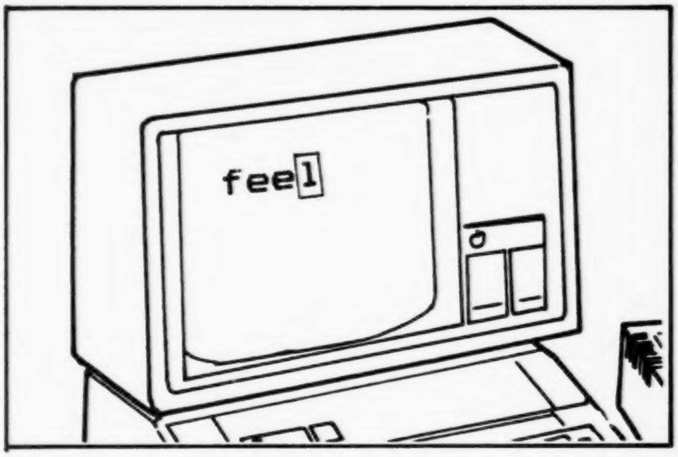
5. Type the correct letter.
6. Space forward and continue typing.



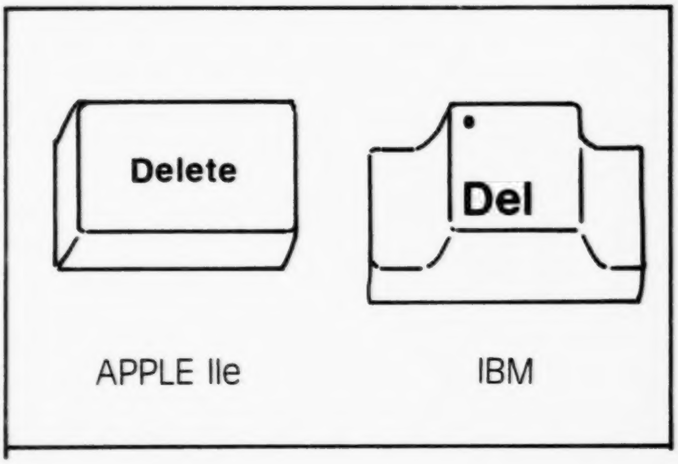
### To use the delete key to correct errors on a microcomputer. . .

1. Use the arrow keys to move the cursor to the letter just to the right of the error.



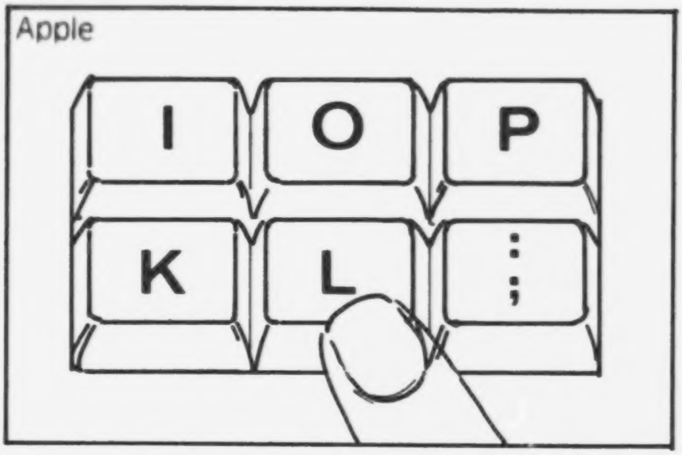


2. Press the delete key or Del key which removes the incorrect letter from the screen.



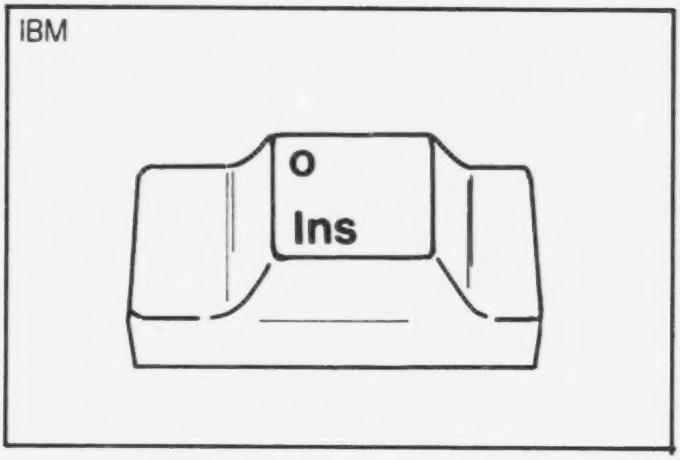
3. Insert the correct letter by typing the correct letter (Apple IIe and Applewriter program).

Apple



4. Or, insert the correct letter by pressing the insert key and then typing the correct letter (IBM PC and Peachtext program).

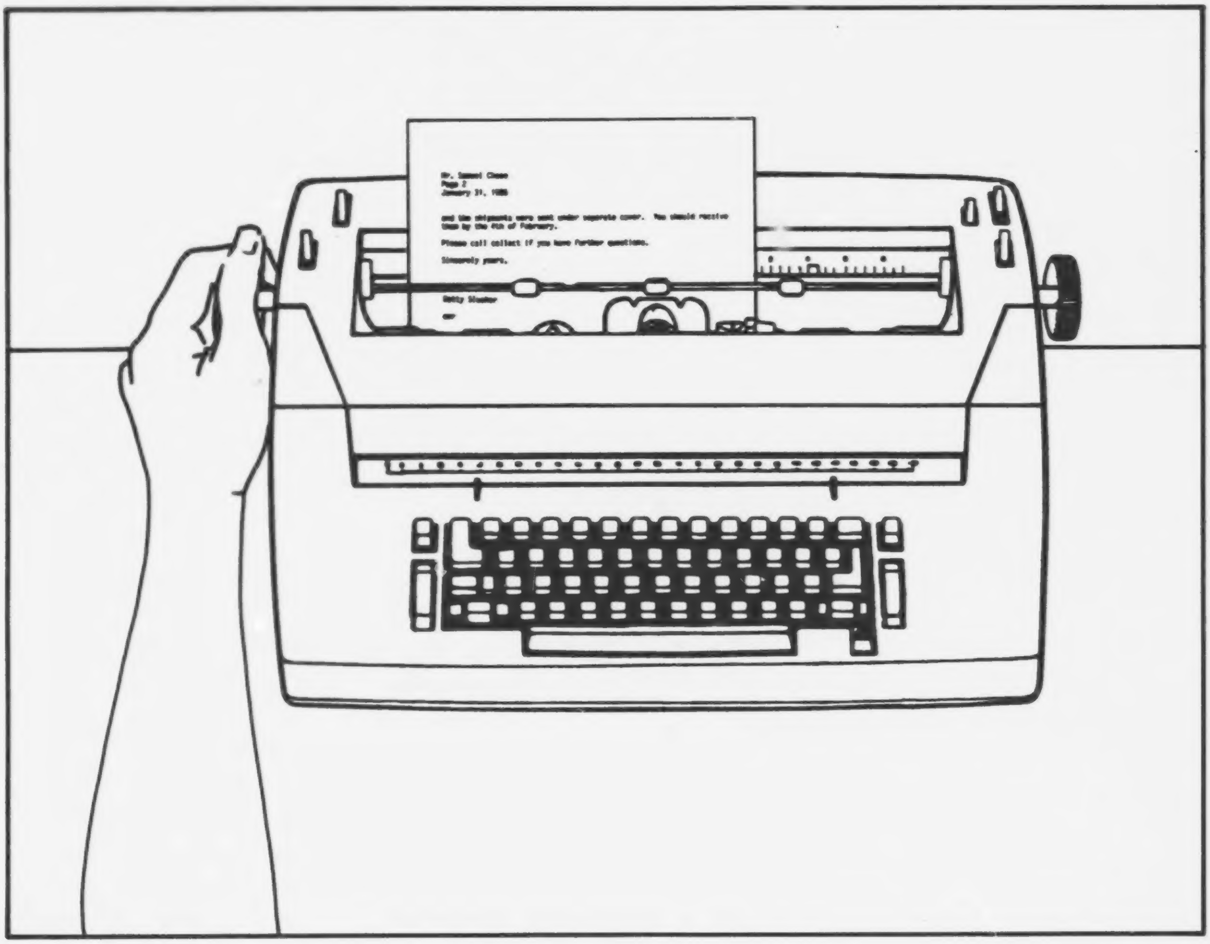
IBM



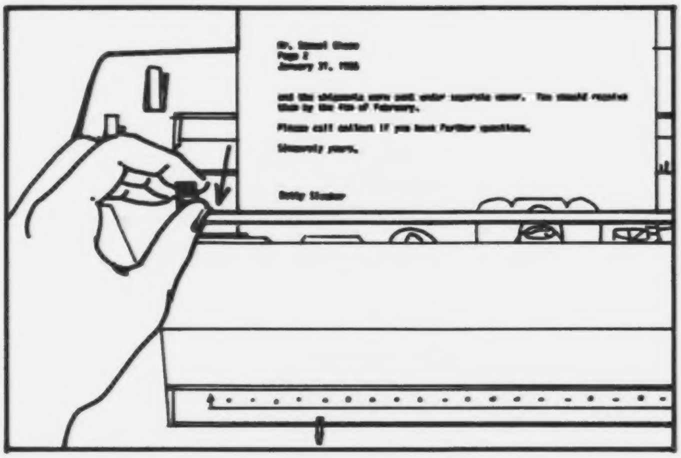
To correct extensive errors using correction fluid or correction tape. . .

**NOTE:** Correspondence must be photocopied and mailed and the original kept as a file copy if it is corrected in this manner.

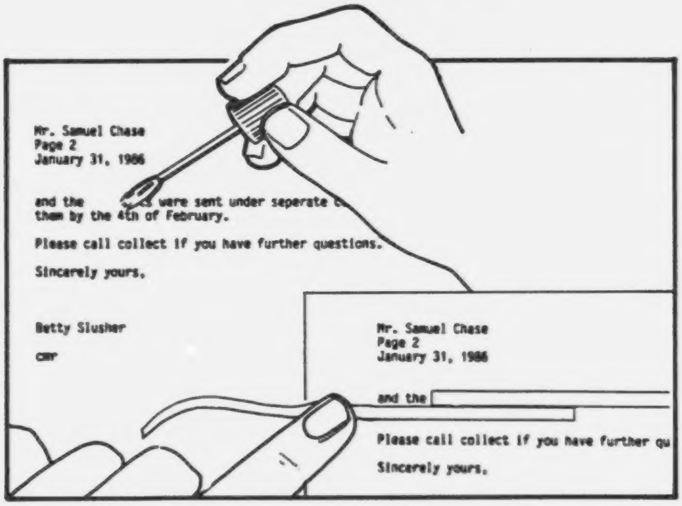
1. Using the cylinder knob or index key, turn the platen so that the error is clearly visible.



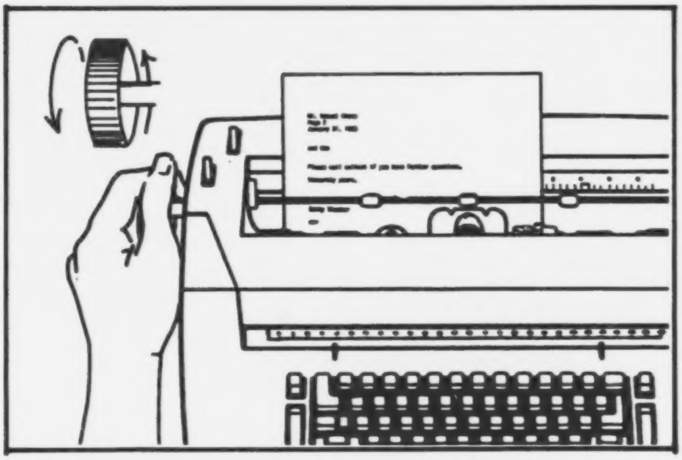
2. Pull the paper bail forward.



3. Apply thin coats of correction fluid to the error (dab, don't brush) or cover the error with correction tape.


Mr. Samuel Chase
Page 2
January 31, 1986
and the were sent under seperate c
them by the 4th of February.
Please call collect if you have further questions.
Sincerely yours,
Betty Slusher
cmr
Mr. Samuel Chase
Page 2
January 31, 1986
and the
Please call collect if you have further qu
Sincerely yours,

4. After the correction fluid is completely dry, turn the cylinder knob to roll the paper back into position for retyping.



# Typing Letters
# Unit Review

**Directions:** Fill in the blank with the best answer for each question.

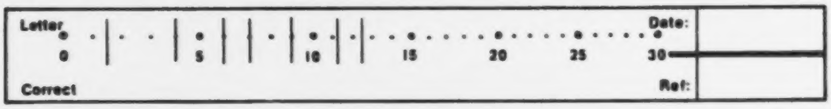
1. The "control" key is a __________ key. It must be held down while another key is typed.

2. The following word counts were provided on a textbook assignment. Determine whether the letters are short, average, or long by circling the correct length. Fill in the margin settings for those letter lengths in the space provided.

| | | | | 12 PITCH | | 10 PITCH | |
|---|---|---|---|---|---|---|---|
| WORD COUNT | CLASSIFICATION | | | LM | RM | LM | RM |
| 119 | short | average | long | ___ | ___ | ___ | ___ |
| 324 | short | average | long | ___ | ___ | ___ | ___ |
| 207 | short | average | long | ___ | ___ | ___ | ___ |
| 83 | short | average | long | ___ | ___ | ___ | ___ |

3. A handwritten letter is 17 lines long. The first line of the body contains 10 words. Is the letter classified as short, average or long? ________________

4. Locate the third piece of correspondence on the following index strip and tell whether the letter is:
   a. short
   b. average
   c. long



5. You are typing a letter that will be photocopied and mailed to 25 offices. You accidently type paragraph 3, which is a two-line paragraph, where paragraph 2 should be. You are using a typewriter that has a lift off ribbon. Check the correction techniques you could use.
   __ cover-up tape
   __ lift off tape
   __ lift off ribbon
   __ correction fluid
   __ correction tape
   __ delete

# Typing Letters
# Performance Checklist

Student ______________________ has successfully performed the following steps of procedure.

| Typing Letters | Yes | No | Comments |
|---|---|---|---|
| 1. Identified and assembled equipment | | | |
| 2. Determined whether the body of a letter was classified as | | | |
| short, average, or long by: looking for the word count or | | | |
| estimating the length of the body of a handwritten letter or | | | |
| estimating length of the body of a typed letter | | | |
| 3. Consulted a chart for appropriate margin settings | | | |
| 4. Correctly set the margins | | | |
| 5. Chose the appropriate correction technique based on the equipment available and the nature of the typing assignment | | | |

Satisfactory - Should Move On ☐
Repeat This Unit ☐

______________________ Student Signature/Date

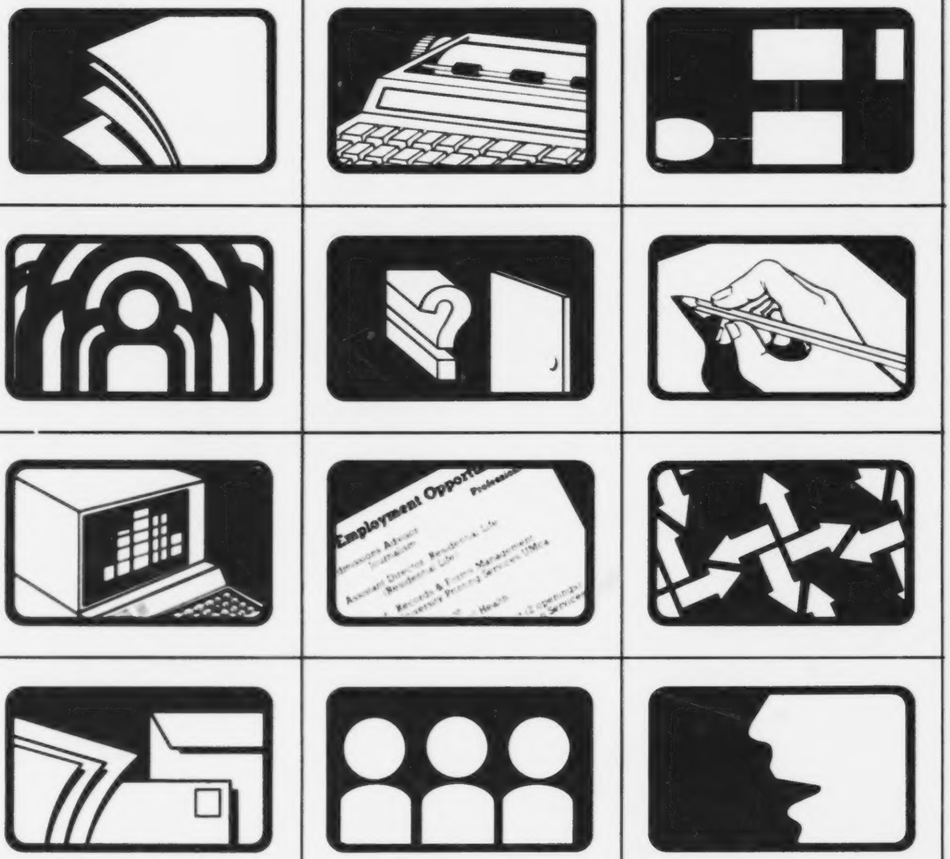
______________________ Instructor Signature/Date

SN-92-S

SUPPLEMENTARY UNITS FOR
SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

# Typing Tables

## Unit 4


Employment Opport
Professio
Admissions Advisor
Journalism
Assistant Director, Residential Life
(Residential Life)
Assistant Director, Records & Forms Management
Records & Forms
University Printing Services UMca
Health
(2 openings)
Services

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# Typing Tables
# Introduction

Typing tables and working with numbers is an important responsibility for a clerical/secretarial worker. The ability to prepare reports rapidly and accurately can be a factor leading to promotions and pay increases.

This unit reviews the names of the parts of a table and the steps of procedure for typing tables.

---

## Unit Objective

After completion of this unit, you should be able to type tables which contain a main heading, subheading, and column headings.

## Specific Objectives

After completion of this unit, you should be able to:

1. Center a table vertically.
2. Center a table horizontally.
3. Type a table.

---

## Are You Ready?

Check the statement which is true for you.

☐

I want to study the information in this unit before doing the Performance Checklist.

**TURN TO NEXT PAGE AND BEGIN**

☐

I can do the above tasks and I am ready to do the Performance Checklist.

**SEE YOUR INSTRUCTOR**

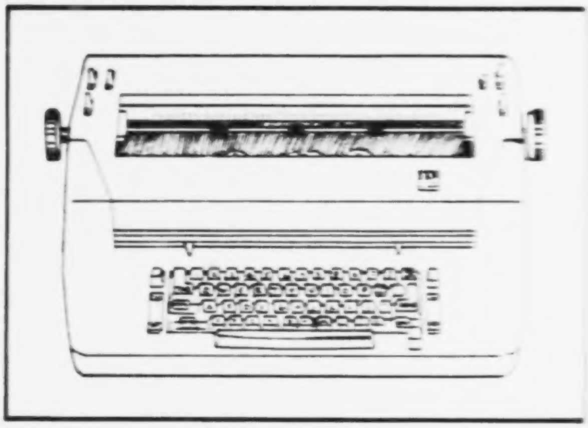
# Typing Tables

## A. Terms and Equipment Needed for Typing Tables

### Terms

1. Horizontal - across, or between the left and right edges, of a sheet of paper
2. Horizontal centering - a table is centered horizontally if half of the longest line of type is on each side of the center point. On an 8½" x 11" sheet of paper the center point is 51 for 12 pitch (elite) and 42 for 10 pitch (pica).
3. Tab - to move across a horizontal line rapidly by depressing a special tab key. This eliminates excessive use of the space bar.
4. Vertical - up and down, or between the top and bottom edges, of a sheet of paper
5. Vertical centering - a table is centered vertically if half the unused blank lines are above the table and half of the unused lines are below the table. When centering a table vertically, it is useful to know that there are 66 lines (6 lines per inch) vertically on an 8½" x 11" sheet of paper.

### Equipment

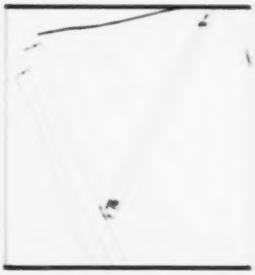


Typewriter

Table to Type

Correction Materials

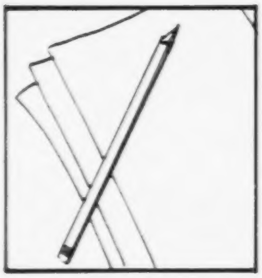
Typing Paper



Pencil and Paper

## B. Steps for Centering Tables Vertically

1. Clear your work area.
2. Assemble equipment.



Paper and pencil

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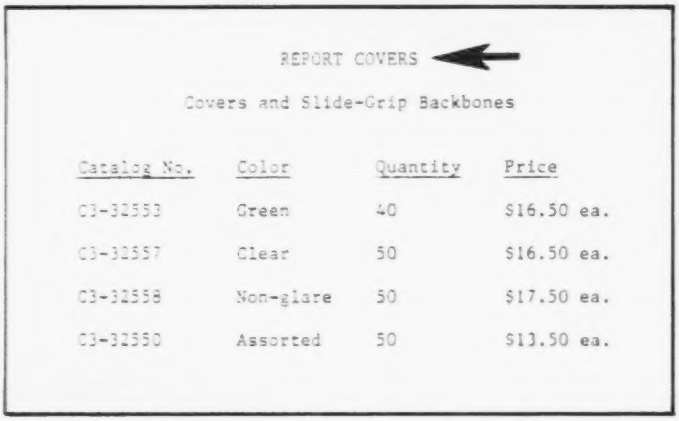
Table to type

3. Count the number of vertical lines, both typed and blank, that the table will use on a page.
4. Look for the main heading of the table. Write down a one on the paper.



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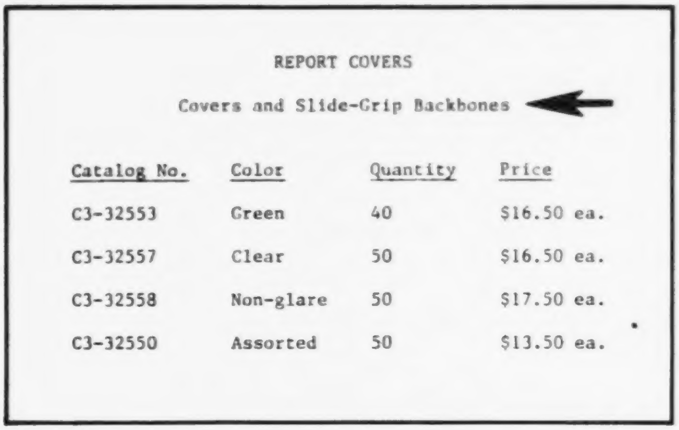
Typed Lines
1

5. Look for the subheading. Write another "1" on the paper.



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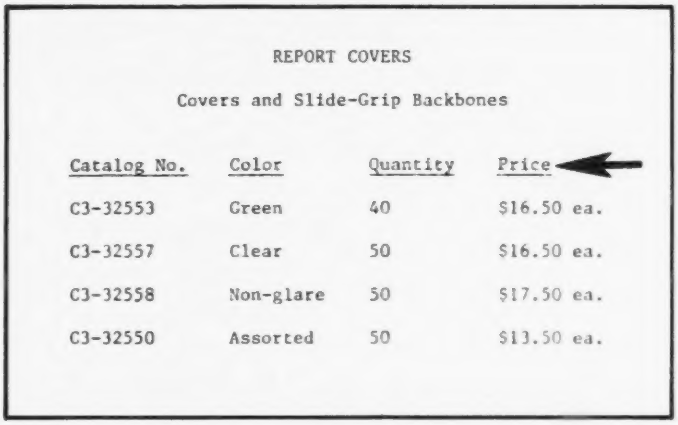
| C3-32550 | Assorted | 50 | $13.50 ea. |

Typed Lines

1
1

6. Locate the line of column headings. Enter a "1" on the paper.



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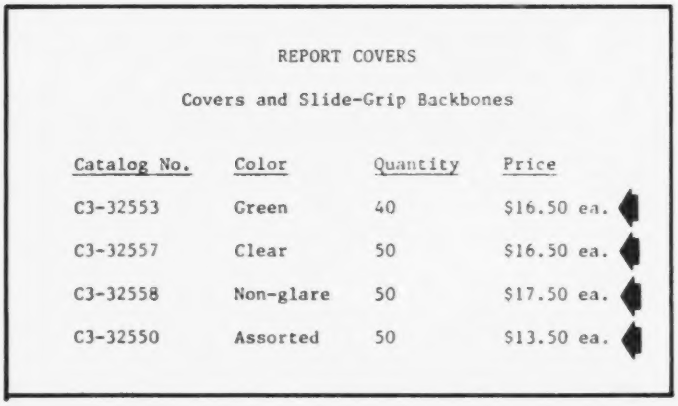
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

Typed Lines

1
1
1

7. Count the number of typed lines in the body of the table. In this case, write "4" on the paper.



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| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

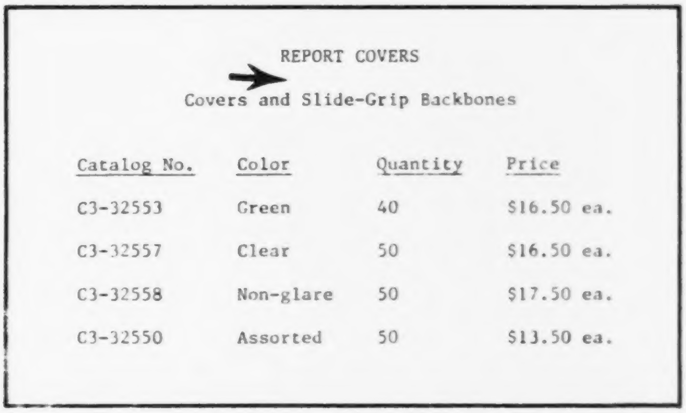
Typed Lines

1
1
1
4

8. Now add the number of typed lines to find the total.

| Typed Lines |
|---|
| 1 |
| 1 |
| 1 |
| 4 |
| 7 |

9. Look at the space between the main heading and subheading. Mark a "1" on the paper.



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Covers and Slide-Grip Backbones

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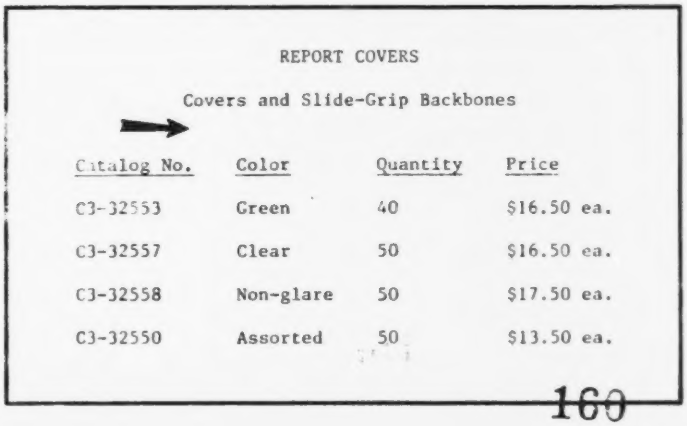
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

| Typed Lines | Blank Lines |
|---|---|
| 1 | 1 |
| 1 | |
| 1 | |
| 4 | |
| 7 | |

10. Look at the spaces between the subheading and the column headings. Write a 2" on the paper.



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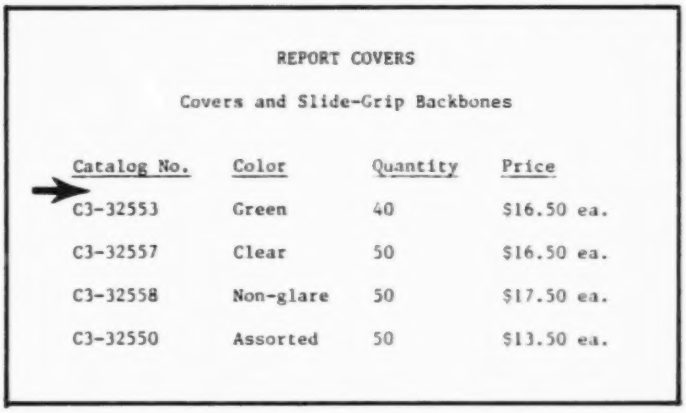
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

| Typed Lines | Blank Lines |
|---|---|
| 1 | 1 |
| 1 | 2 |
| 1 | |
| 4 | |
| 7 | |

11. Write a "1" on the paper for the space between the column headings and the first line of the body of the table.



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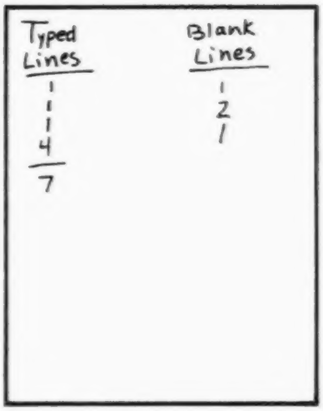
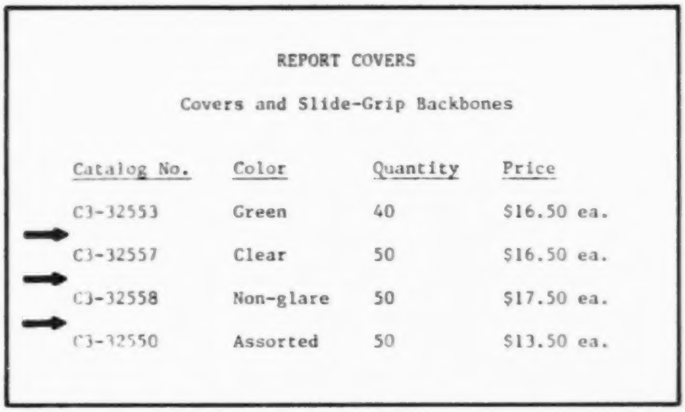


| Typed Lines | Blank Lines |
|---|---|
| 1 | 1 |
| 1 | 2 |
| 1 | 1 |
| 4 | |
| 7 | |

12. When the directions tell you to double space the body of the table, write a "1" on the scratch paper for each blank line you plan to insert between the typed lines. In this case, write in three additional 1's.



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| C3-32557 | Clear | 50 | $16.50 ea. |
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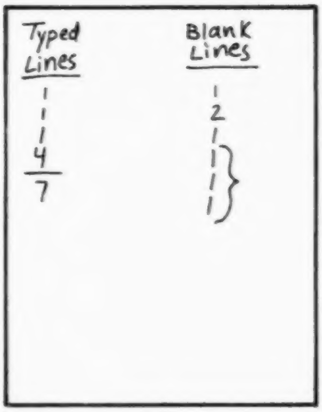
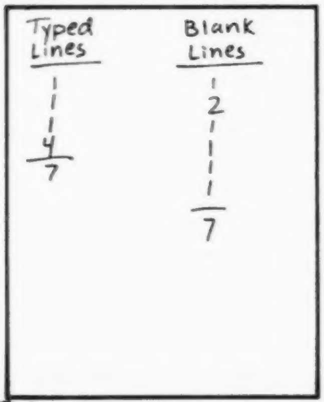


| Typed Lines | Blank Lines |
|---|---|
| 1 | 1 |
| 1 | 2 |
| 1 | 1 |
| 4 | 1 |
| 7 | 1 |
| | 1 |

13. Total the number of blank lines the table will use.



| Typed Lines | Blank Lines |
|---|---|
| 1 | 1 |
| 1 | 2 |
| 1 | 1 |
| 4 | 1 |
| 7 | 1 |
| | 1 |
| | 7 |

14. Add the typed lines to the blank lines.

| Typed Lines | Blank Lines |
|---|---|
| 1 | 1 |
| 1 | 2 |
| 1 | 1 |
| 4 | 1 |
| 7 | 1 |
|  | 1 |
|  | 7 |

$$\begin{array}{r} 7 \\ \underline{+7} \\ 14 \end{array}$$

15. Subtract the combined lines (typed plus blank) from 66, because there are 66 lines possible on a page.

| Typed Lines | Blank Lines |
|---|---|
| 1 | 1 |
| 1 | 2 |
| 1 | 1 |
| 4 | 1 |
| 7 | 1 |
|  | 1 |
|  | 7 |

$$\begin{array}{r} 7 \\ \underline{+7} \\ 14 \end{array} \quad \begin{array}{r} 66 \\ \underline{-14} \\ 52 \end{array}$$

16. Divide by 2. Drop any remainder.

$$\begin{array}{r} 26 \\ 2\overline{)52} \\ \underline{4}\phantom{2} \\ 12 \\ \underline{12} \\ 0 \end{array}$$

17. Add "1" to the answer. This number represents the line on which the typing should begin.

$26 + 1 = 27$

18. If you have problems, check with your instructor.

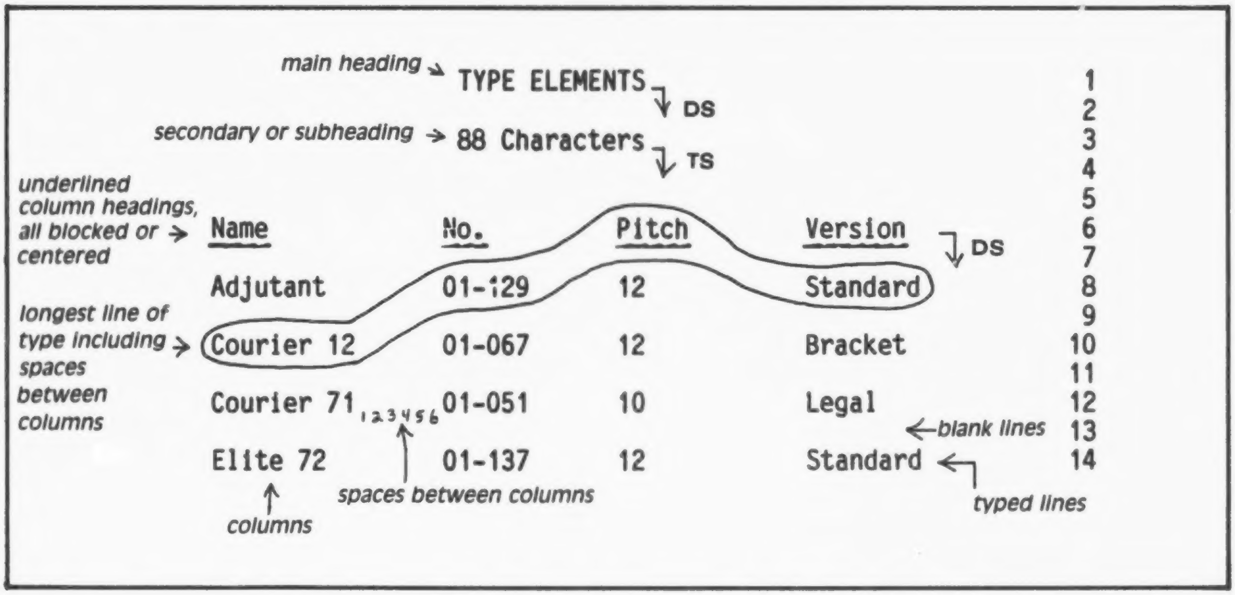
**DO SKILL SHEET 1**

## Typing Tables
# Skill Sheet 1

To understand instructions for typing tables, knowledge of the names of the parts of tables is necessary. The parts include:

A. main heading
B. secondary or subheading
C. underlined column headings, either all blocked or all centered
D. columns
E. longest line of type including spaces between columns
F. blank lines
G. typed lines
H. spaces between columns (spaces between columns may vary from table to table)

The parts of the following table are labeled and their spacing is indicated.

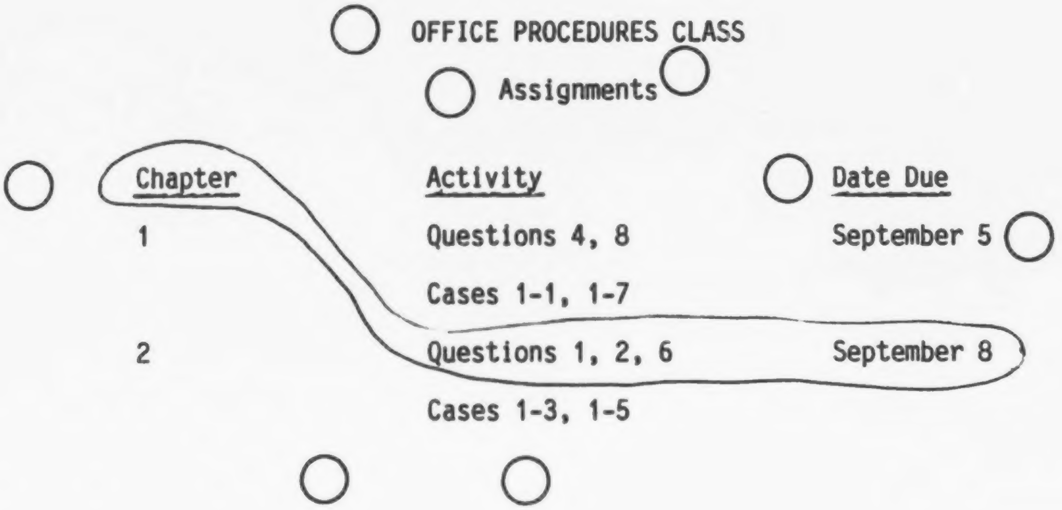


TYPE ELEMENTS

88 Characters

| Name | No. | Pitch | Version |
|---|---|---|---|
| Adjutant | 01-129 | 12 | Standard |
| Courier 12 | 01-067 | 12 | Bracket |
| Courier 71 | 01-051 | 10 | Legal |
| Elite 72 | 01-137 | 12 | Standard |

**Directions:** Using names of the parts of the table as listed on the previous page, labeled A-H, fill in the circles with the appropriate letter.



OFFICE PROCEDURES CLASS

Assignments

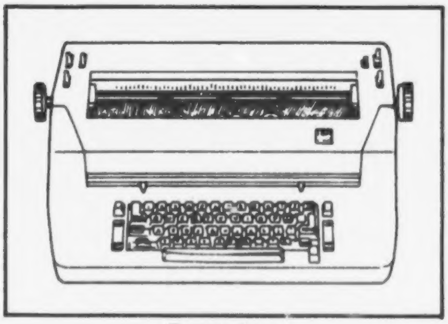
| Chapter | Activity | Date Due |
|---|---|---|
| 1 | Questions 4, 8 | September 5 |
| | Cases 1-1, 1-7 | |
| 2 | Questions 1, 2, 6 | September 8 |
| | Cases 1-3, 1-5 | |

**Directions:** Answer the following questions concerning the table.

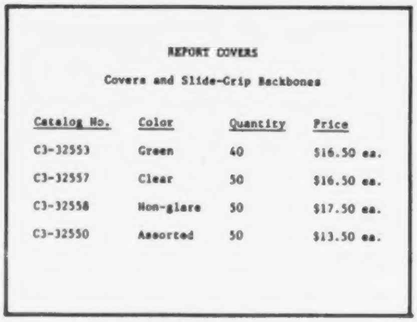
1. How many typed lines are in the table? ________
2. How many blank lines are used by the table? ________
3. How many combined lines are used by the table? ________
4. On which line of type would a typist start typing the main heading? ________
   Show math steps.

## C. Steps for Centering Tables Horizontally

1. Assemble necessary equipment.



Typewriter



REPORT COVERS

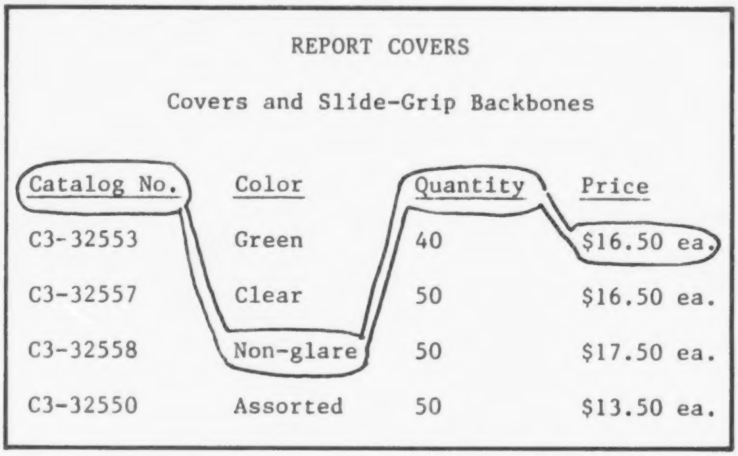
Covers and Slide-Grip Backbones

| Catalog No. | Color | Quantity | Price |
|---|---|---|---|
| C3-32553 | Green | 40 | $16.50 ea. |
| C3-32557 | Clear | 50 | $16.50 ea. |
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

Table to Type

2. Determine the number of spaces in the longest line of the table.

3. Circle the longest item in each column.



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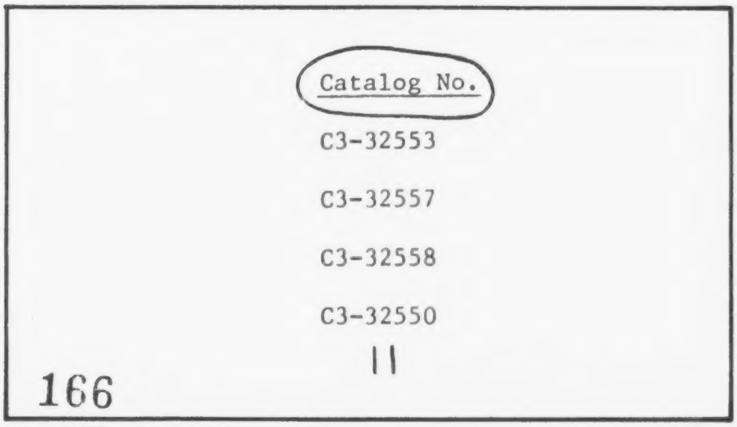
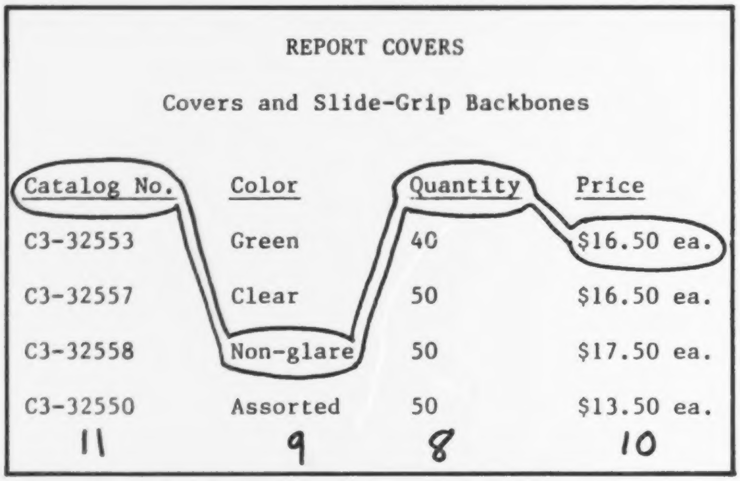
| C3-32557 | Clear | 50 | $16.50 ea. |
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

4. Count the number of strokes in column one. Record the answer at the bottom of column one.



| Catalog No. |
|---|
| C3-32553 |
| C3-32557 |
| C3-32558 |
| C3-32550 |
| 11 |

5. Count the number of strokes in each additional column and record the answers at the bottom of each column.



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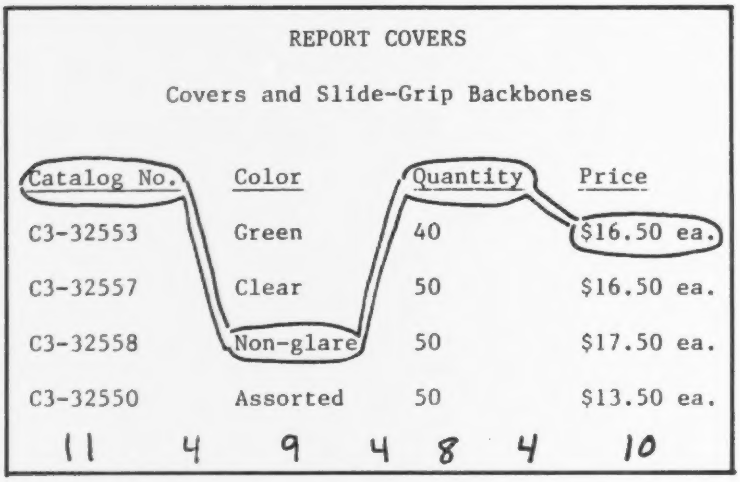
|---|---|---|---|
| C3-32553 | Green | 40 | $16.50 ea. |
| C3-32557 | Clear | 50 | $16.50 ea. |
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |
| 11 | 9 | 8 | 10 |

6. For this problem, the number of spaces between columns is 4. Record the number of spaces at the bottom of the table.



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| Catalog No. | Color | Quantity | Price |
|---|---|---|---|
| C3-32553 | Green | 40 | $16.50 ea. |
| C3-32557 | Clear | 50 | $16.50 ea. |
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

11 4 9 4 8 4 10

7. Add the spaces in all the columns and the spaces between all the columns to determine the total number of spaces in the longest line in the table.

Catalog No. Non-glare Quantity $16.50 ea.

11 + 4 + 9 + 4 + 8 + 4 + 10 = 50

8. Now, determine the left margin setting.

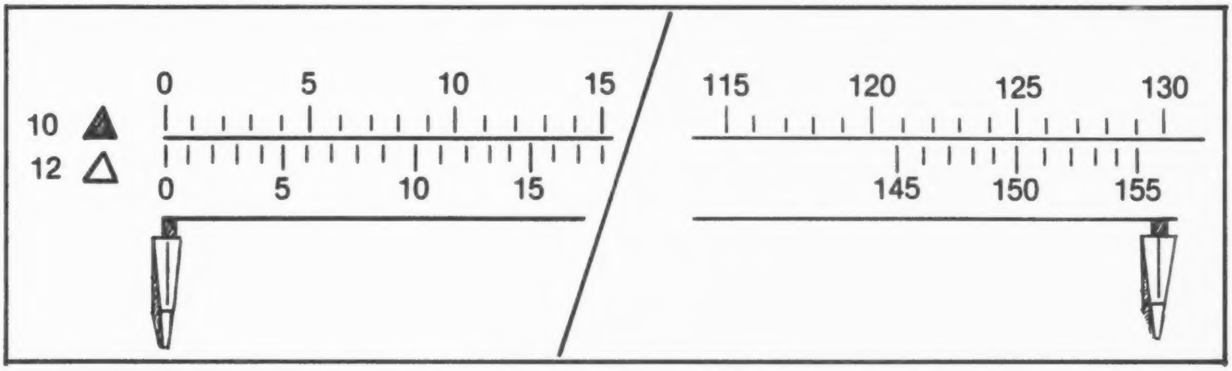
9. Divide the number of spaces in the longest line in the table by 2. Drop any remainder.

$$\begin{array}{r} 25 \\ 2\overline{)50} \\ \underline{4\phantom{0}} \\ 10 \\ \underline{10} \\ 0 \end{array}$$

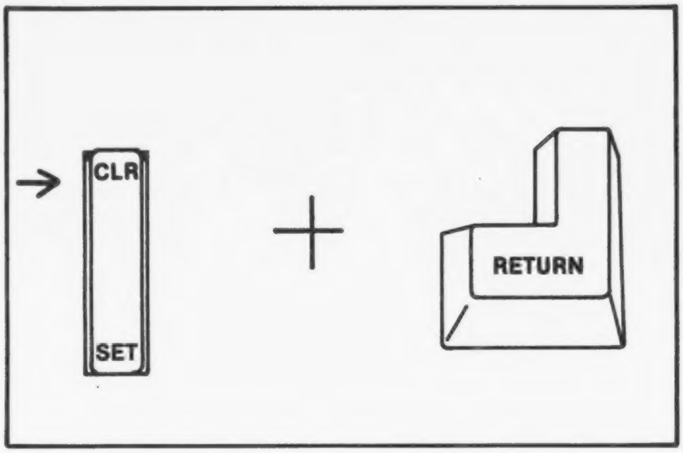
10. Subtract the answer from 51 for 12 pitch or 42 for 10 pitch.

$$\begin{array}{r} 51 \\ \underline{-25} \\ 26 \end{array}$$

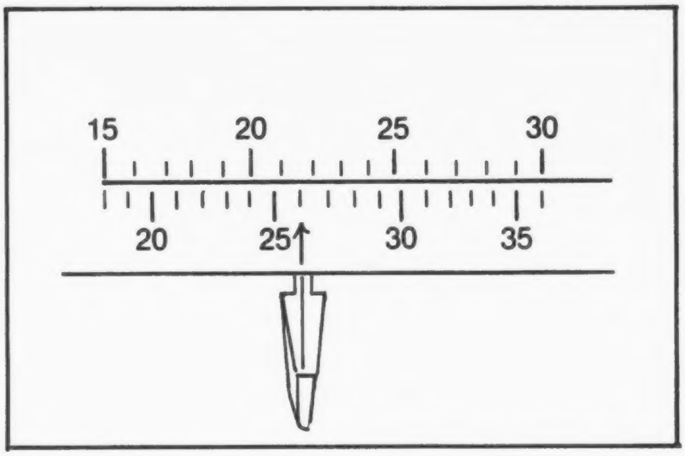
11. Turn on your typewriter and follow procedures to clear both margin settings.



12. Clear all tab settings.

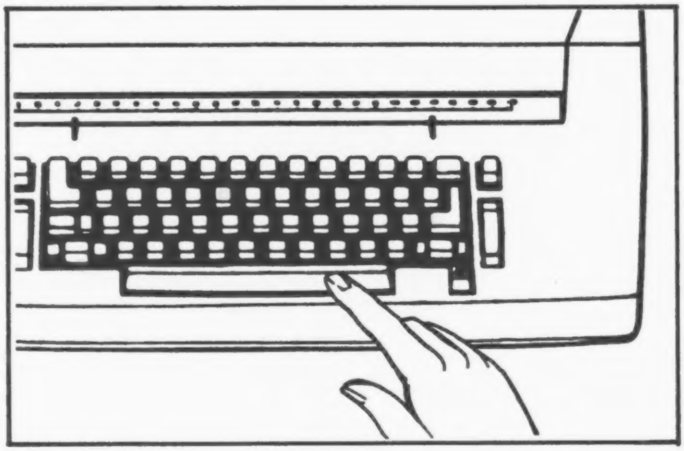


13. Set the left margin. (This is the location for the first column of the table.)

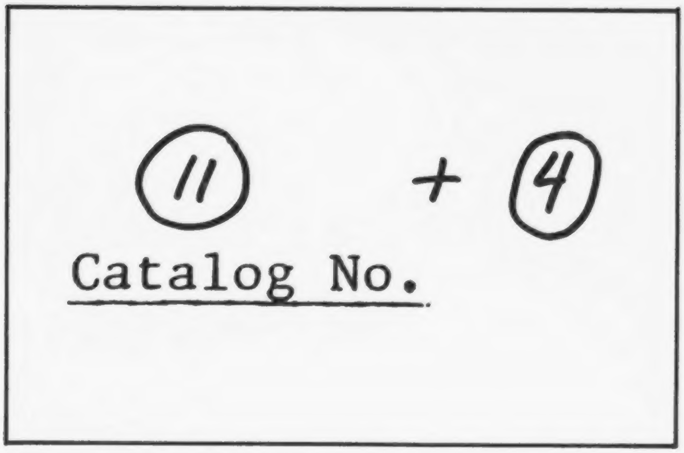


14. Determine the tab settings for the remaining columns.

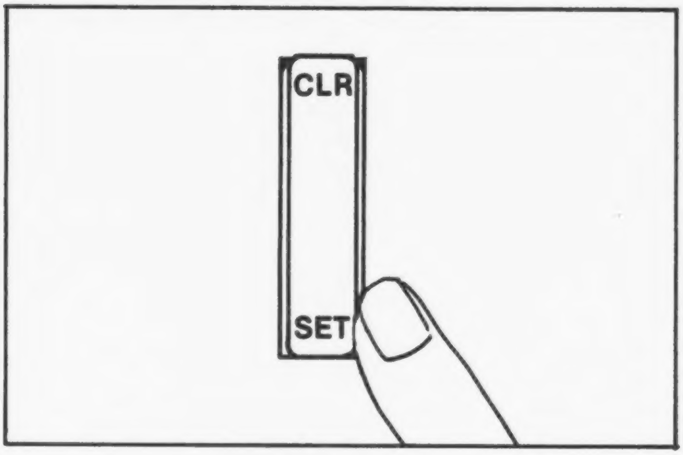
15. Using the space bar, space forward one space for each stroke of the



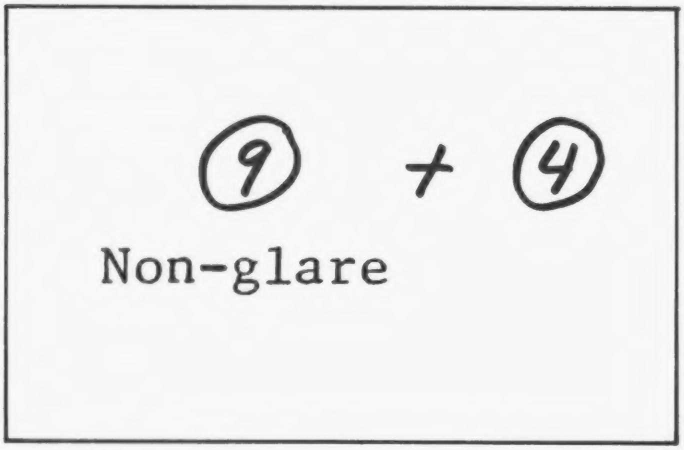
longest item in the first column and for the spaces between columns one and two.



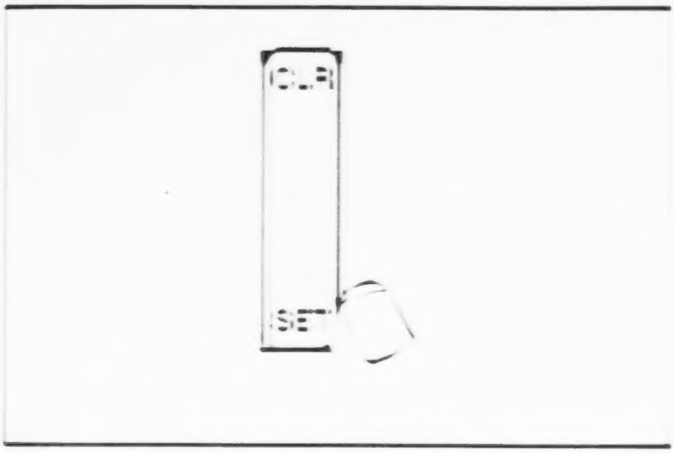
16. Set a tab.



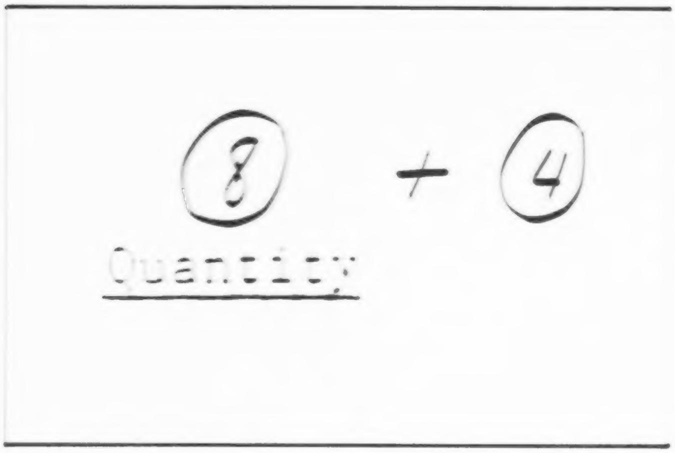
17. Space forward one space for each stroke of the longest item in the second column and for the spaces between columns two and three.



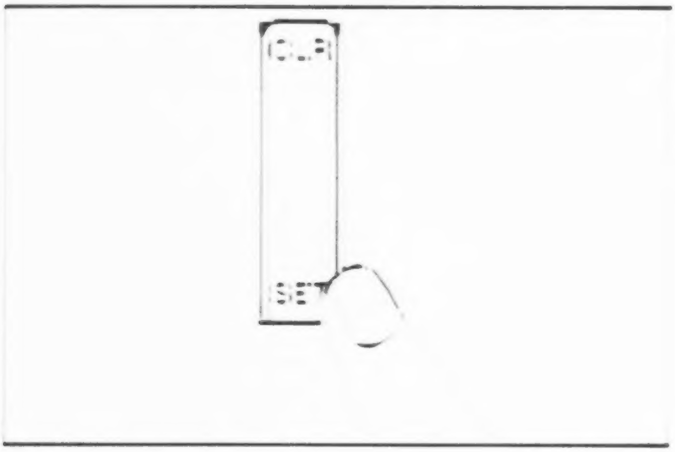
18. Set a tab.



19. Space forward one space for each stroke of the longest item in the third column and for the spaces between columns three and four.



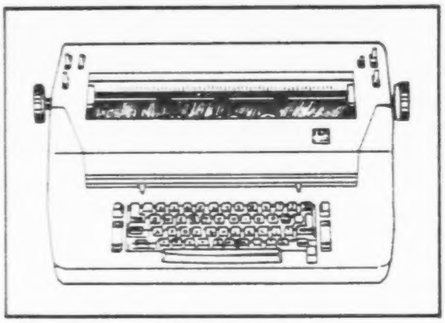
20. Set a tab.



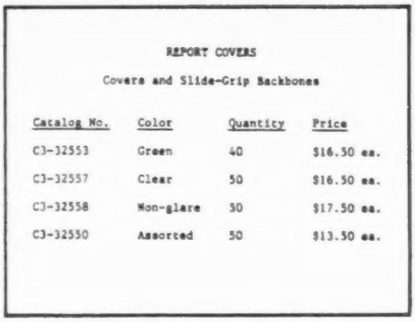
## D. Steps for Typing Tables

1. Clear your work area.

2. Assemble equipment.



Typewriter



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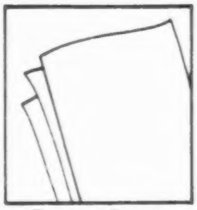
| C3-32557 | Clear | 50 | $16.50 ea. |
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

Table to Type

Correction Materials



Typing Paper

3. Determine the line on which to begin typing.
**NOTE:** Refer to steps for centering tables vertically in this unit.

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|---|---|---|---|
| C3-32553 | Green | 40 | $16.50 ea. |
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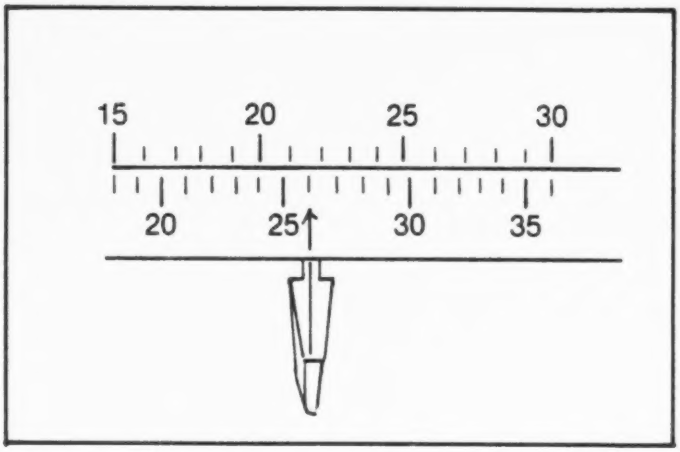
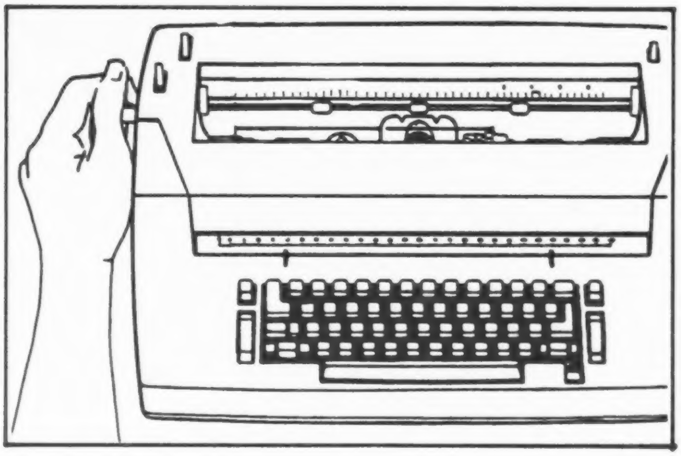
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

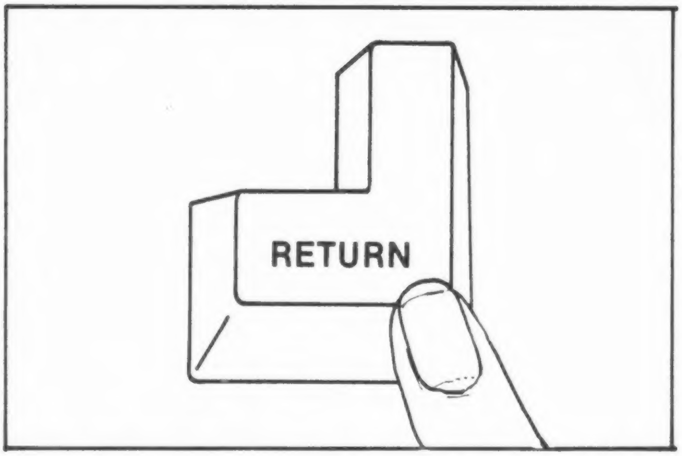
4. Set the left margin and tabs for each column.
   **NOTE: Refer to steps for centering tables horizontally in this unit.**



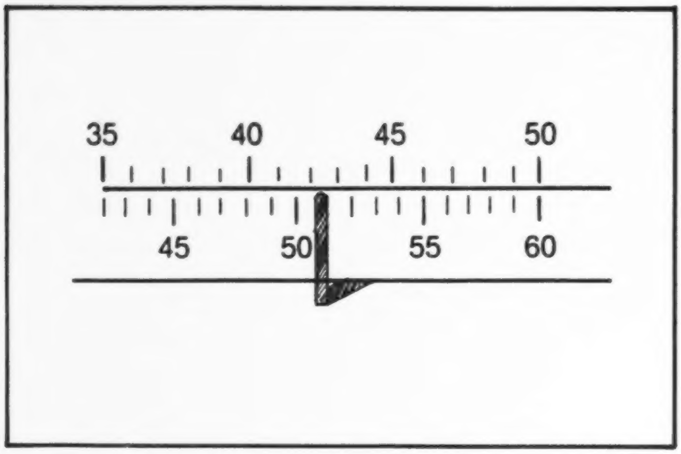
5. Place the typing paper in the typewriter and bring the paper up to the line on the transparent line finder.



6. Return carriage the number of times that you calculated earlier to find the line on which the typing should begin.
   **NOTE:** The table in this example starts on line 27.



7. Space over to 51 (the center of the page with the elite type).
8. Determine where to begin typing the main heading by. . .



counting the strokes in the main heading (13) and

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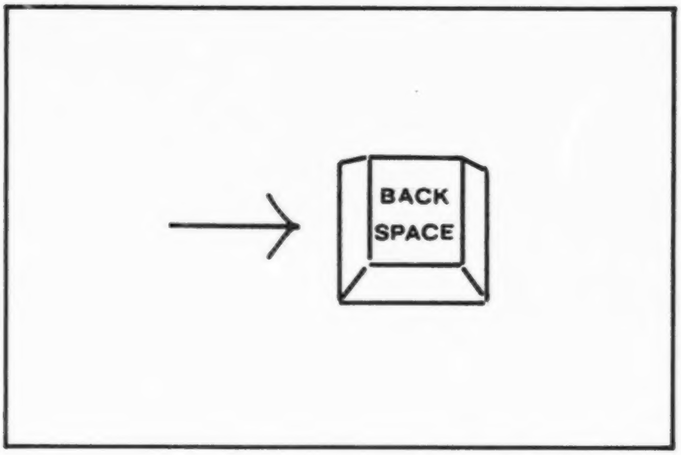
1 2 3 4 5 6 7 8 9 10 11 12 13

dividing by 2.
**NOTE:** Drop any remainder. The answer (6) is the number of times you will backspace from the center to begin typing.

$$\begin{array}{r|l} & 6 \\ \hline 2 & 13 \\ & 12 \\ \hline & 1 \end{array}$$

9. Backspace 6 times.

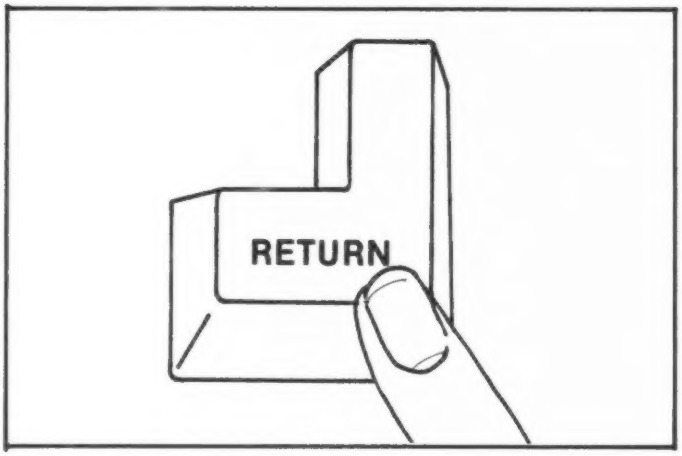


10. Type the main heading using all capital letters.

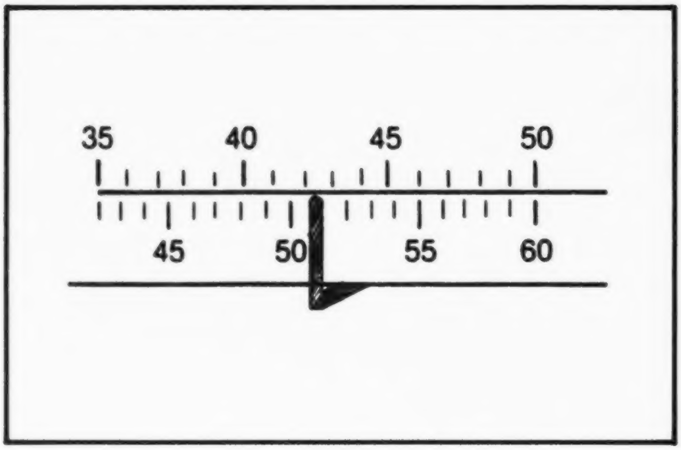
REPORT COVERS

11. Return the carriage twice.

12. Determine where to begin typing the subheading.



Space to 51. (51 is the center of the page with elite type.)



Count the strokes in the subheading (31).

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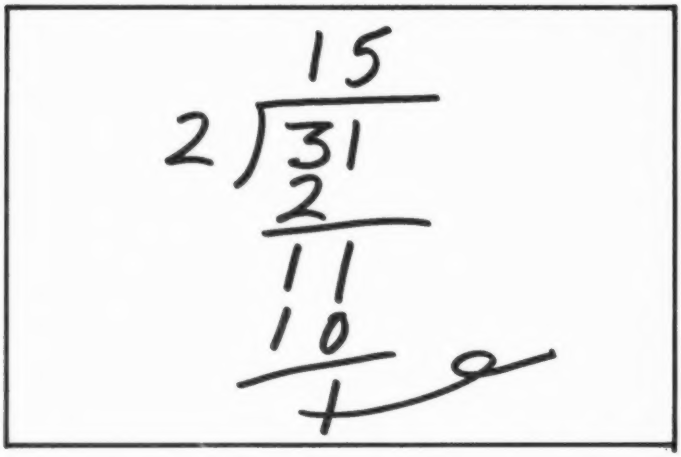
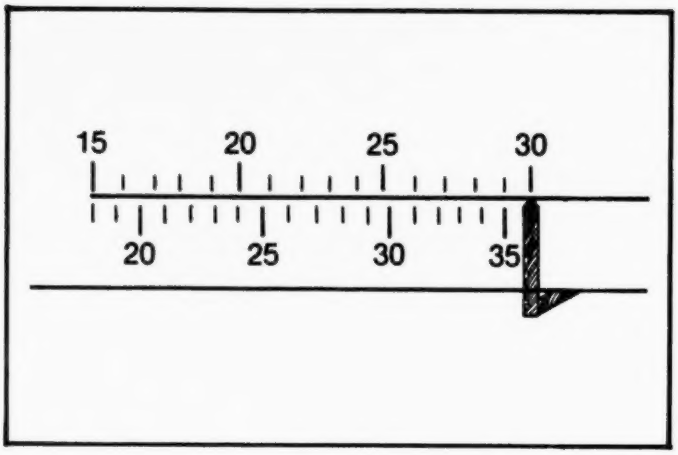
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

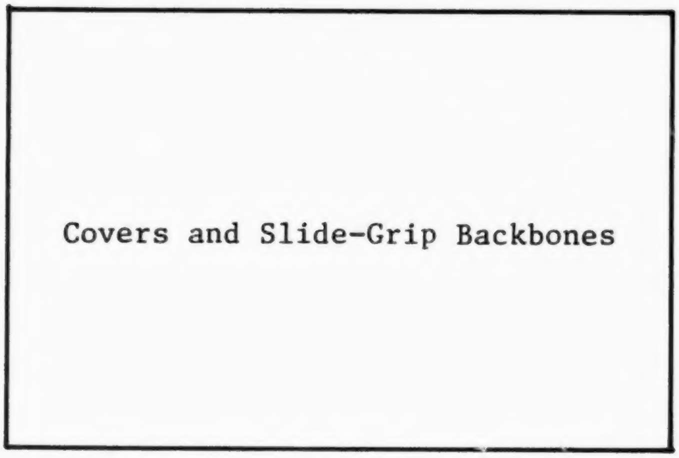
Divide by 2.
(Drop any remainder.)



13. Backspace 15 times.
    **NOTE:** Check to see that your position indicator is now on 36.



14. Type the subheading using upper and lower case.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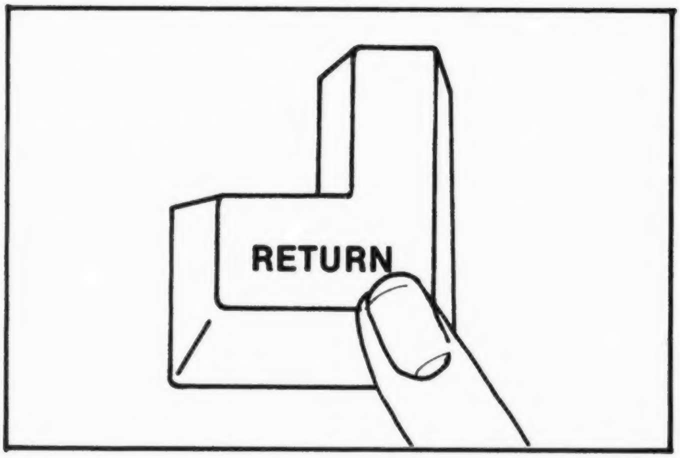
15. Return the carriage three times to triple space.

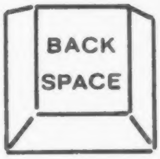


16. Type the first column heading at the left margin.

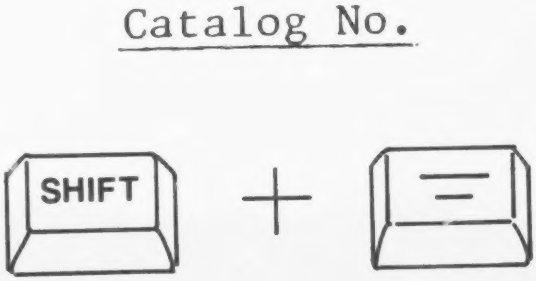
    Capitalize the first letter of each word.

Catalog No.

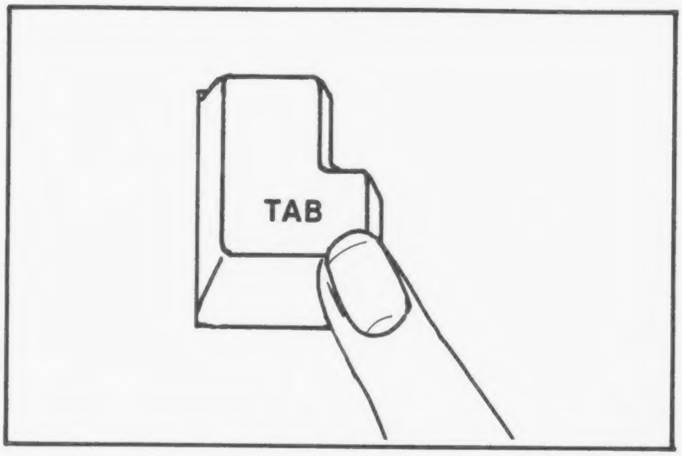
17. Backspace to the beginning of the column.



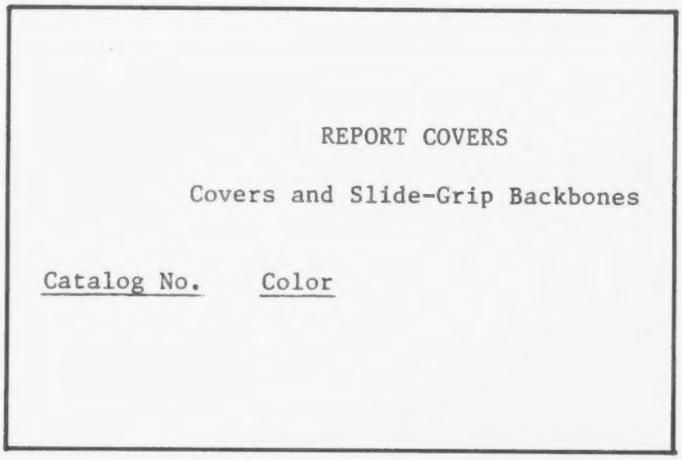
18. Underscore the heading by holding down the shift key and typing the underscore key.



19. Press the tab key.



20. Type and underline the second column heading.



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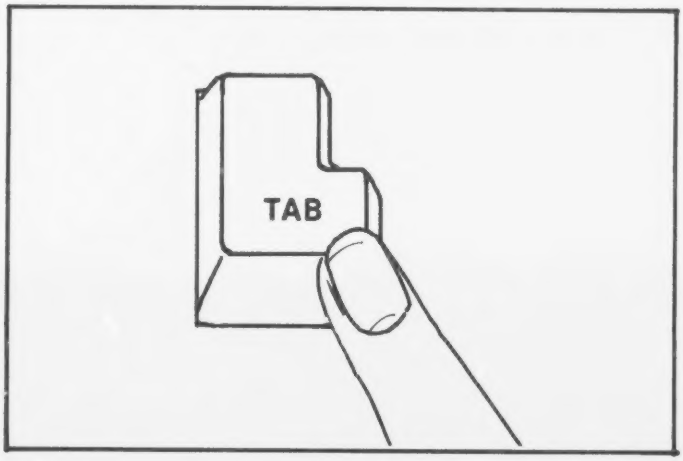
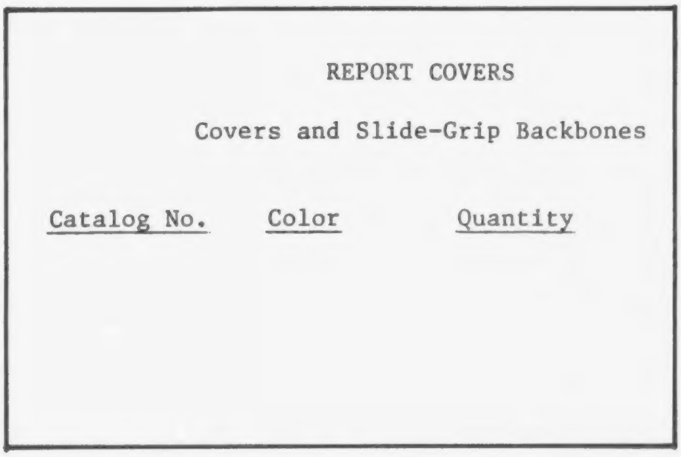
Catalog No.    Color

21. Press the tab key.



22. Type and underline the third column heading.



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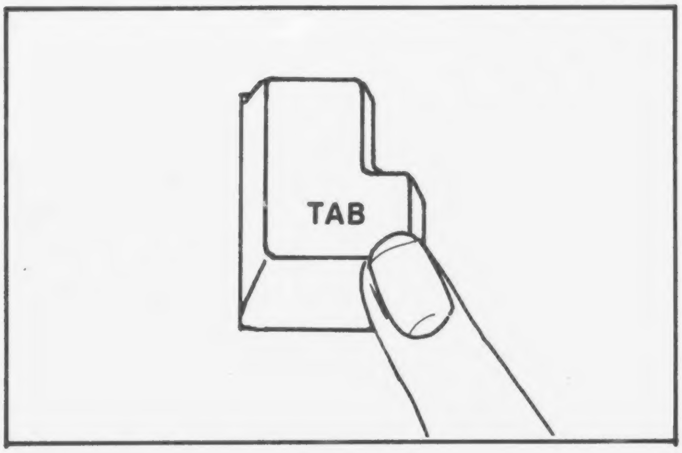
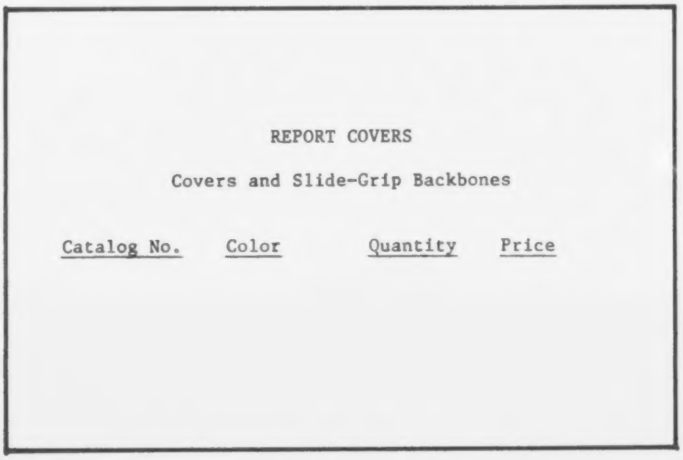
Covers and Slide-Grip Backbones

Catalog No.    Color    Quantity

23. Press the tab key.



24. Type and underline the fourth column heading.



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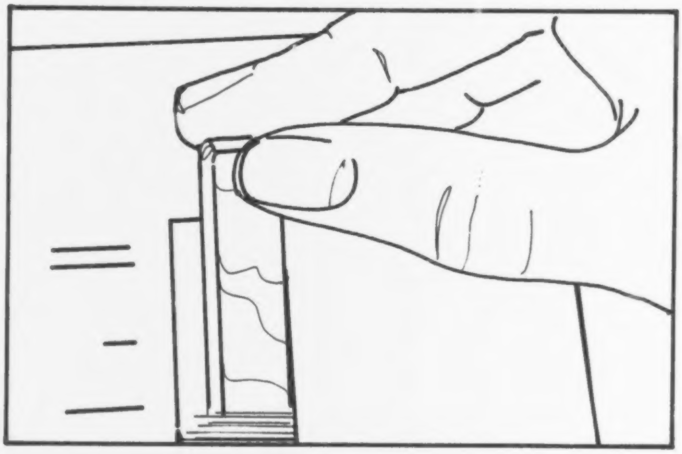
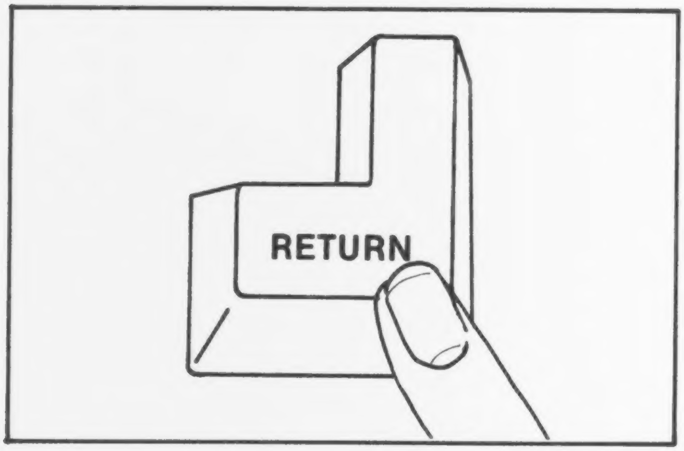
Catalog No.    Color    Quantity    Price

25. Set the typewriter on double spacing.

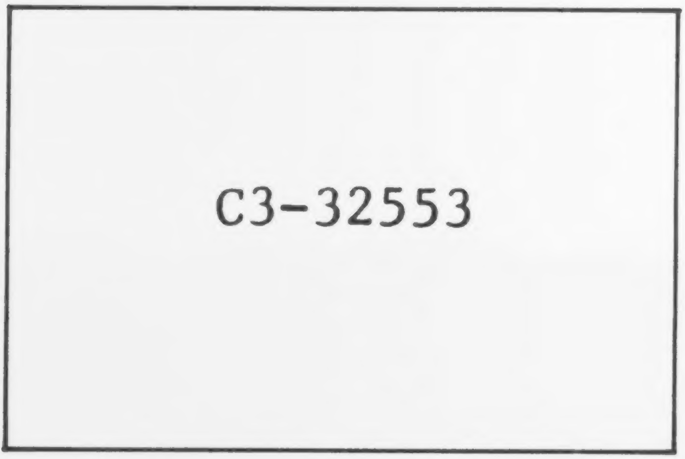
**NOTE:** This table is to be doublespaced.



26. Return the carriage.

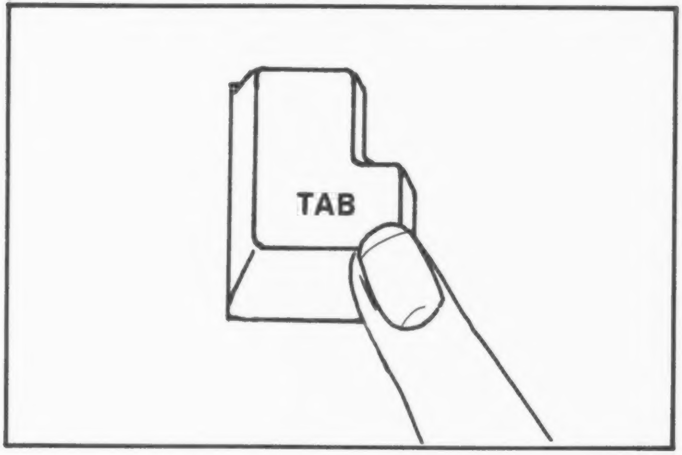


27. Type the first item of the table.



C3-32553

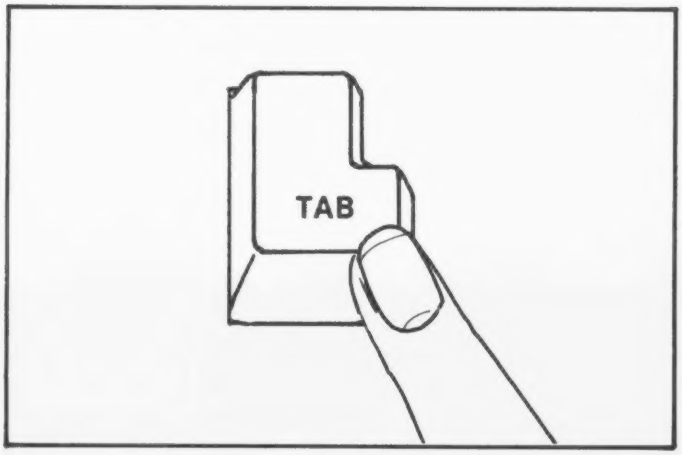
28. Press the tab key.



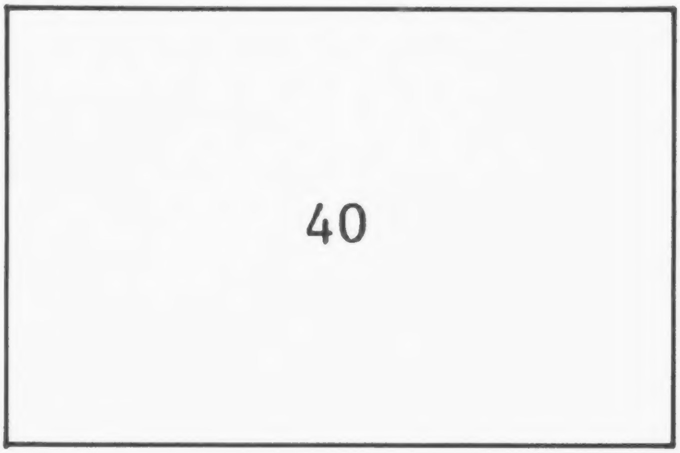
29. Type the second item.

Green

30. Press the tab key.

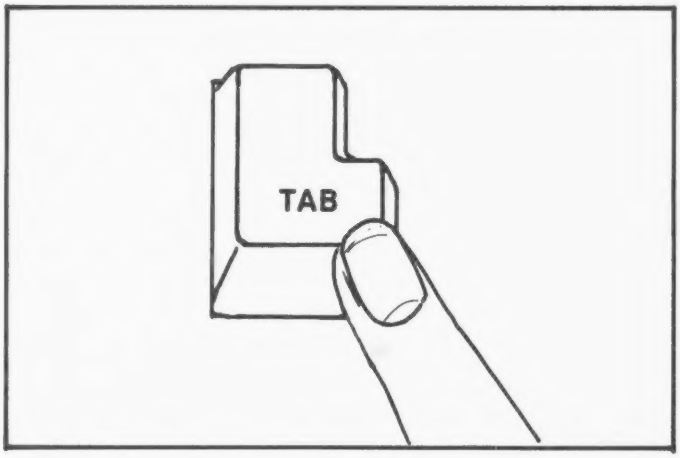


31. Type the third item.

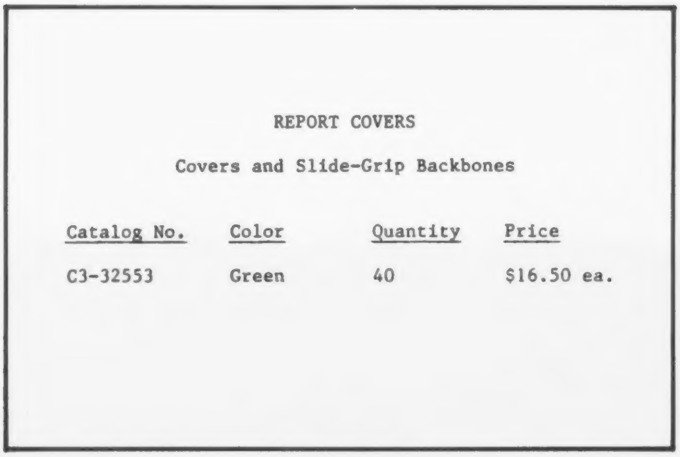


40

32. Press the tab key.



33. Type the fourth item.



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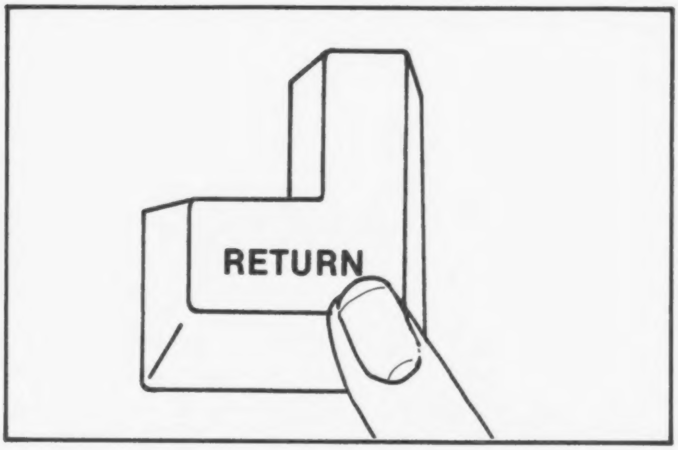
| Catalog No. | Color | Quantity | Price |
|---|---|---|---|
| C3-32553 | Green | 40 | $16.50 ea. |

34. Return the carriage.



35. Continue typing and tabbing across the page until all of the lines have been typed.

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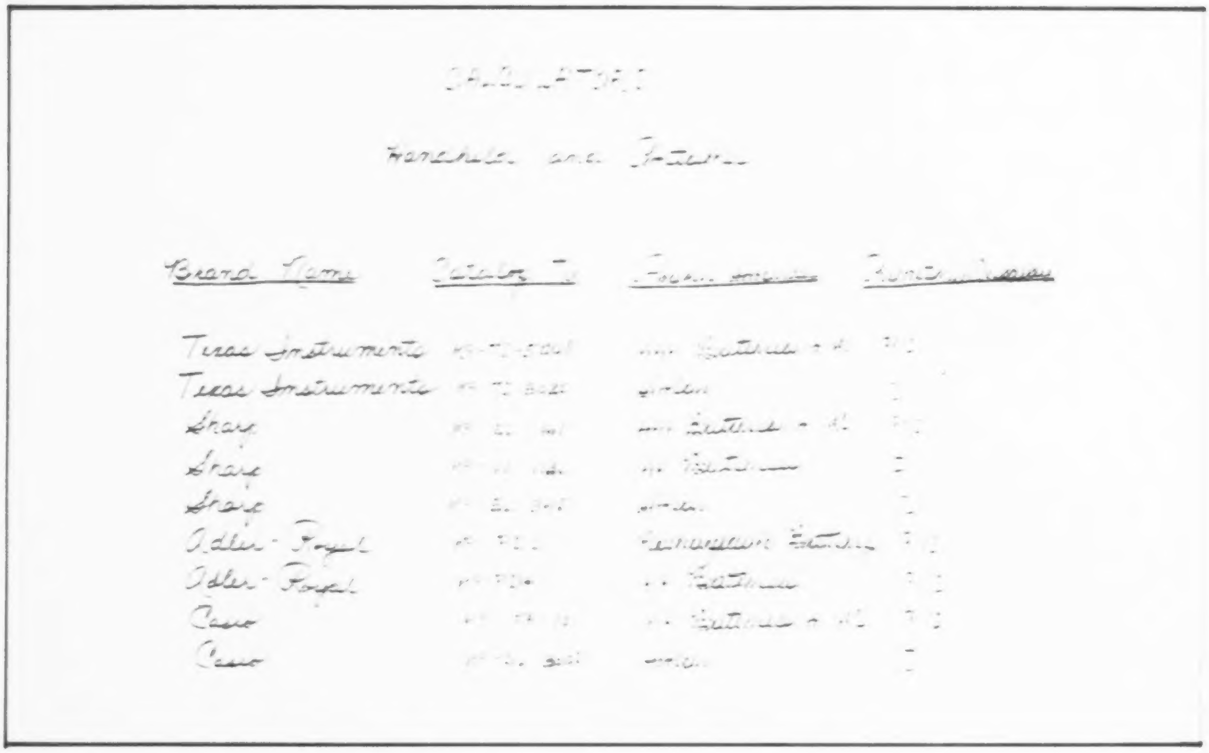
| Catalog No. | Color | Quantity | Price |
|---|---|---|---|
| C3-32553 | Green | 40 | $16.50 ea. |
| C3-32557 | Clear | 50 | $16.50 ea. |
| C3-32558 | Non-glare | 50 | $17.50 ea. |
| C3-32550 | Assorted | 50 | $13.50 ea. |

**DO SKILL SHEET 2**

# Typing Tables
# Skill Sheet 2

**Directions:** Look at the following table and answer the questions.



CALCULATORS

Handheld and Printers

| Brand Name | Catalog No. | Power Source | Printer/Display |
|---|---|---|---|
| Texas Instruments | [illegible] | AAA Batteries & AC | [illegible] |
| Texas Instruments | [illegible] | Solar | [illegible] |
| Sharp | [illegible] | AAA Batteries & AC | [illegible] |
| Sharp | [illegible] | AA Batteries | [illegible] |
| Sharp | [illegible] | Solar | [illegible] |
| Adler-Royal | [illegible] | Rechargeable Batteries | [illegible] |
| Adler-Royal | [illegible] | AA Batteries | [illegible] |
| Casio | [illegible] | AA Batteries & AC | [illegible] |
| Casio | [illegible] | Solar | [illegible] |

1. What is the main heading? ______________________________
2. What is the longest entry in Column 1? ______________________________
3. What is the longest entry in Column 2? ______________________________
4. What is the longest entry in Column 3? ______________________________
5. What is the longest entry in Column 4? ______________________________

6. How many strokes are in the longest line of type in the table?

___ +6 ___ +6 ___ +6 ___ = ___

7. What would be the left margin setting for this table?
Show math steps.

8. How many lines are needed for this table if it is single spaced? ________________

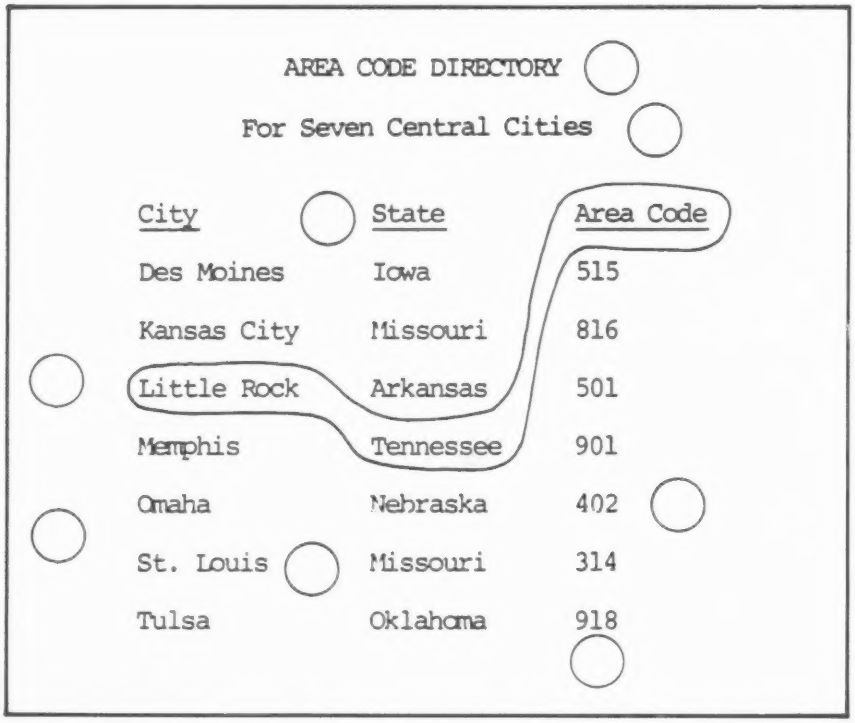
9. On which line of type would a typist start typing the main heading on a full sheet of paper? ________________________

10. Type the table in the correct form single spaced.

# Typing Tables
# Unit Review

1. Place the appropriate letters in the circles in this Area Code Directory table.

| | |
|---|---|
| A. Main Heading | E. Longest Line of Type |
| B. Subheading | F. Blank Lines |
| C. Column Headings | G. Typed Lines |
| D. Columns | H. Spaces Between Columns |



AREA CODE DIRECTORY

For Seven Central Cities

| City | State | Area Code |
|---|---|---|
| Des Moines | Iowa | 515 |
| Kansas City | Missouri | 816 |
| Little Rock | Arkansas | 501 |
| Memphis | Tennessee | 901 |
| Omaha | Nebraska | 402 |
| St. Louis | Missouri | 314 |
| Tulsa | Oklahoma | 918 |

**Directions:** Circle the correct answer.

2. How many carriage returns should be placed between the main heading and the subheading?
   a. none
   b. one
   c. two
   d. three

**Directions:** Study the following table and answer the questions concerning it:

IBM COMPATIBLE PRINTWHEELS

For Use With the 6240 Printer
and the 3730 Printer

| Catalog No. | IBM Part No. | Type Style | Pitch |
|---|---|---|---|
| 01-A7501 | - - - - - | Orator 100% | 12 |
| 01-A7504 | 001504086 | Prestige Elite | 12 |
| 01-A7506 | 001506087 | Letter Gothic | 12 |
| 01-A7502 | - - - - - | OCR-B | 00 |
| 01-A7503 | 001503011 | Courier Pica | 10 |
| 01-A7507 | 001507012 | Prestige Pica | 10 |

1. What is the subheading? ______________________________
2. What is the longest entry in Column 1? ______________________
3. What is the longest entry in Column 2? ______________________
4. What is the longest entry in Column 3? ______________________
5. What is the longest entry in Column 4? ______________________
6. How many strokes are in the longest line of the table?

   _______ +4+ _______ +4+ _______ +4+ _______ = __________
7. What would be the left margin setting for this table? __________
   Show math steps.

8. On which line of type would a typist start typing the main heading? ________
   Show math steps.

## Typing Tables
# Performance Checklist

Student ______________________ has successfully performed the following steps of procedure.

| Centered Table Vertically | Yes | No | Comments |
|---|---|---|---|
| 1. Counted typed lines | | | |
| 2. Checked spacing (single or double) | | | |
| 3. Counted blank lines | | | |
| 4. Added typed and blank lines | | | |
| 5. Subtracted combined lines from 66 | | | |
| 6. Divided by 2; dropped any remainder | | | |
| 7. Added 1 to the answer | | | |

| Centered Table Horizontally | Yes | No | Comments |
|---|---|---|---|
| 1. Determined number of strokes in the longest line of the table | | | |
| 2. Divided by 2 | | | |
| 3. Subtracted answer from center point | | | |
| 4. Cleared margin settings | | | |
| 5. Cleared all tab settings | | | |
| 6. Set a left margin | | | |
| 7. Spaced forward for the longest entry in the column and for spaces between columns as appropriate | | | |
| 8. Set tabs for columns | | | |

| Typed Table | Yes | No | Comments |
|---|---|---|---|
| 1. Brought paper up to line finder position | | | |
| 2. Returned carriage to line on which typing should begin | | | |
| 3. Spaced over to the center point | | | |
| 4. Counted strokes in each heading | | | |
| 5. Divided answer by 2; dropped any remainder | | | |
| 6. Backspaced appropriate number (see 5 above) of lines | | | |
| 7. Correctly typed table headings | | | |
| 8. Typed and underscored column headings | | | |
| 9. Correctly typed column entries | | | |
| 10. Used tab key appropriately | | | |
| 11. Used appropriate spacing | | | |

**Satisfactory - Should Move On** ☐
**Repeat This Unit** ☐

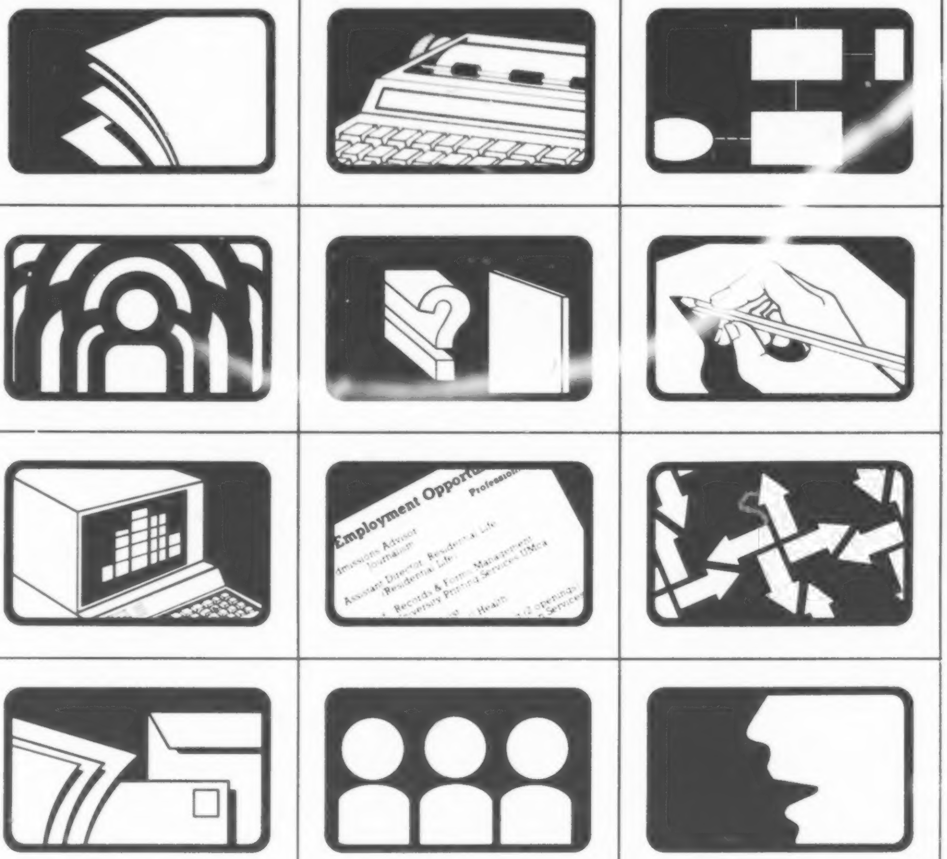
______________________ ______________________
**Student Signature/Date** **Instructor Signature/Date**

SN-92-S

SUPPLEMENTARY UNITS FOR
SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

# Basic Telephone Techniques

## Unit 5



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## Basic Telephone Techniques
# Introduction

Communicating with others through written and oral communications is necessary in 90 percent of all office jobs. In many positions, these communications involve use of the telephone. Workers can increase their ability to communicate effectively if they learn good listening skills and can apply these skills when using the telephone.

This unit provides information about how to improve listening skills and presents the supplies, equipment, and procedures used for good telephone techniques.

## Unit Objectives

After completion of this unit, you should be able to demonstrate good listening skills applied to the use of the telephone.

## Specific Objectives

After completion of this unit, you should be able to:

1. Route incoming telephone calls.
2. Handle telephone inquiries.
3. Take telephone messages.
4. Use a telephone directory.

## Are You Ready?

Check the statement which is true for you.

| | |
|---|---|
| ☐<br>I want to study the information in this unit before doing the Performance Checklist.<br>**TURN THE PAGE AND BEGIN** | ☐<br>I can do the tasks and I am ready to do the Performance Checklist.<br>**SEE YOUR INSTRUCTOR** |

## A. Terms and Equipment Needed for Handling Incoming Telephone Calls

### Terms

1. Appointment calendar - a desk calendar with spaces where employees write notes and reminders about upcoming meetings or events that are important

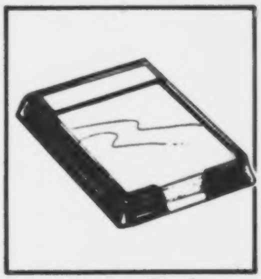
2. Company directory - a listing of a company's departments or personnel and their extension number (an employee should become familiar with the names of people in the company and what they do)

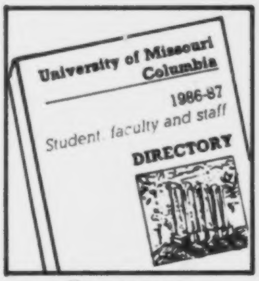
3. Determine the "nature" of a call - learning the reason why the caller contacted your company (for example, the caller may be requesting information)

4. Indexing order - an arrangement for names -- last name, first name, and middle initial -- that helps in alphabetizing

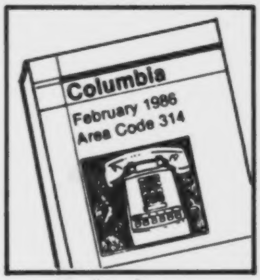
5. "On hold" - the caller is not disconnected but is waiting to speak to someone in your company.

Telephone


Note Pad

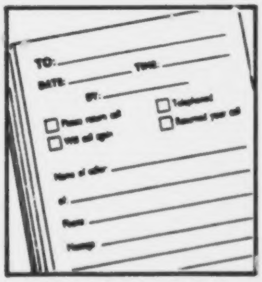


Company Directory

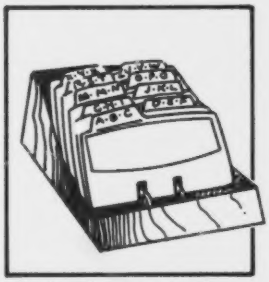


Telephone Directory

Appointment Calendar



Message Pad

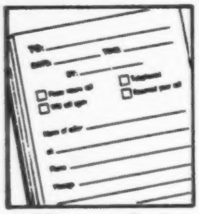


Telephone Index

## B. Steps for Routing Incoming Telephone Calls

1. Organize your work area.
2. Assemble equipment.

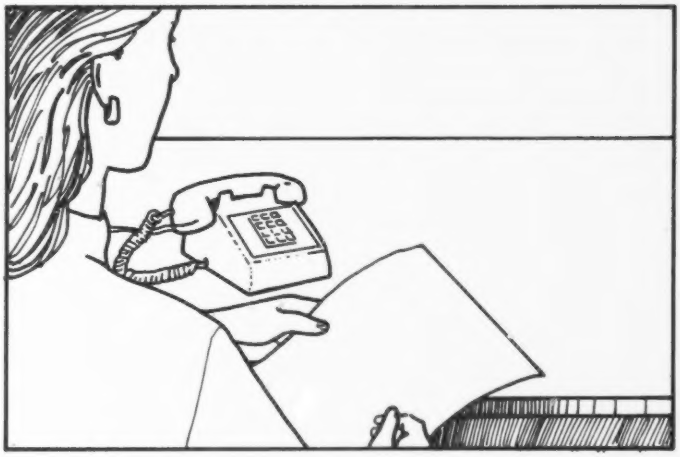
Telephone



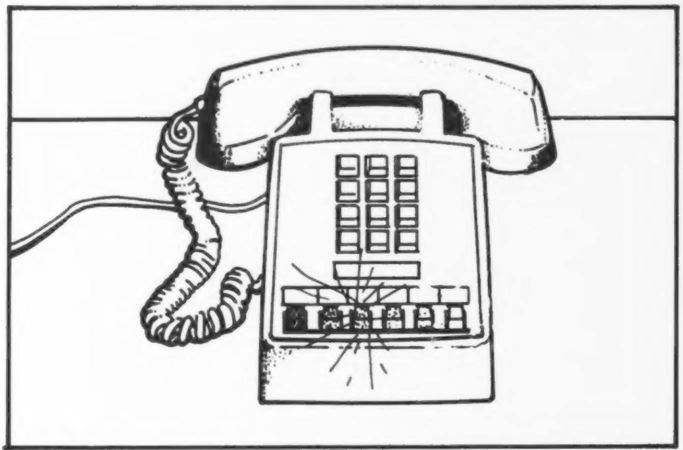
Message Pad

Company Directory

3. Place the telephone in sight and within easy reach.



4. Locate the incoming call which is indicated by a flashing light on the telephone.

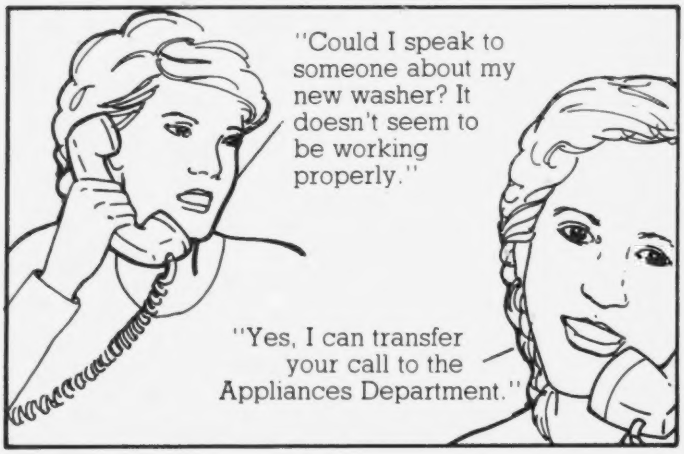


5. Depress the button with the flashing light.

6. Use a cheerful voice, speak clearly as you give a greeting, and tell your company's name.

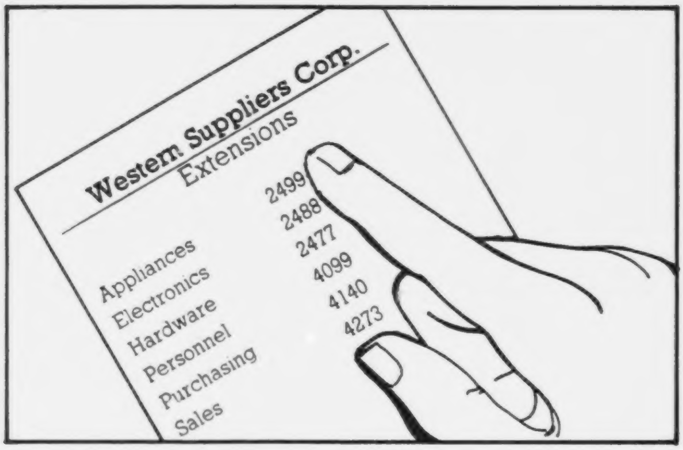
"Good morning. Western Suppliers Corporation."

7. Determine the nature of the telephone call (what the caller wants).

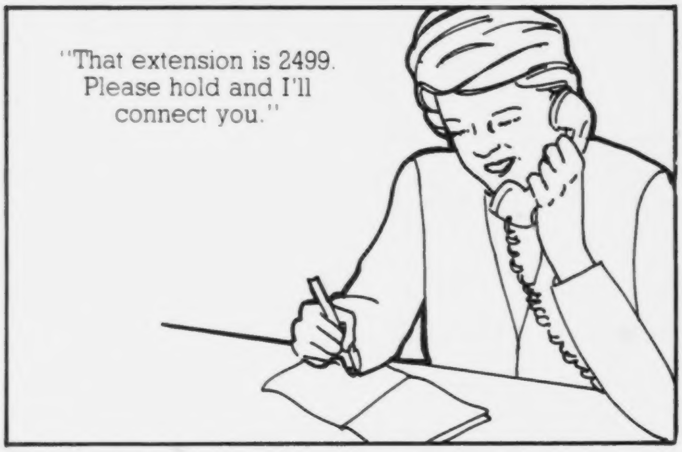

"Could I speak to someone about my new washer? It doesn't seem to be working properly."
"Yes, I can transfer your call to the Appliances Department."

194

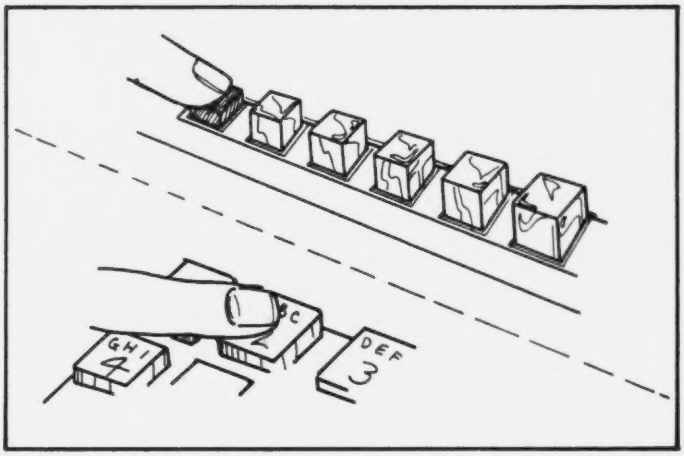
8. Check for the extension number of the department that can take care of the caller.



9. Tell the caller the extension number in case you are disconnected when transferring the call.

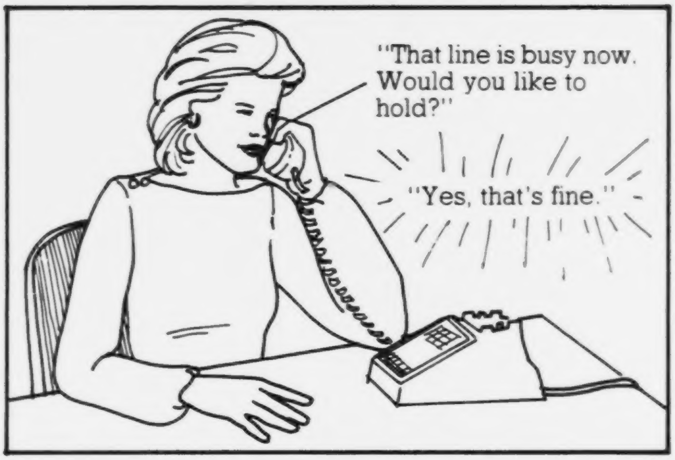

"That extension is 2499. Please hold and I'll connect you."

10. Push the hold button to place the caller on hold (that line should continue to flash indicating that the caller is on hold), then press the appropriate extension number.

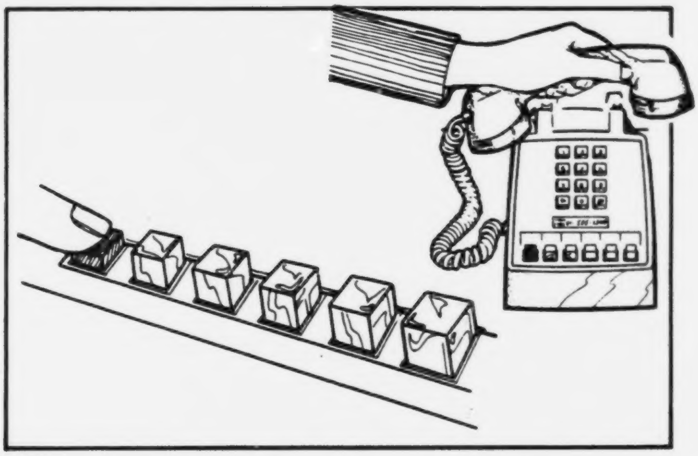


11. If there is no answer or you get a busy signal, depress the flashing button to connect with the caller once again.

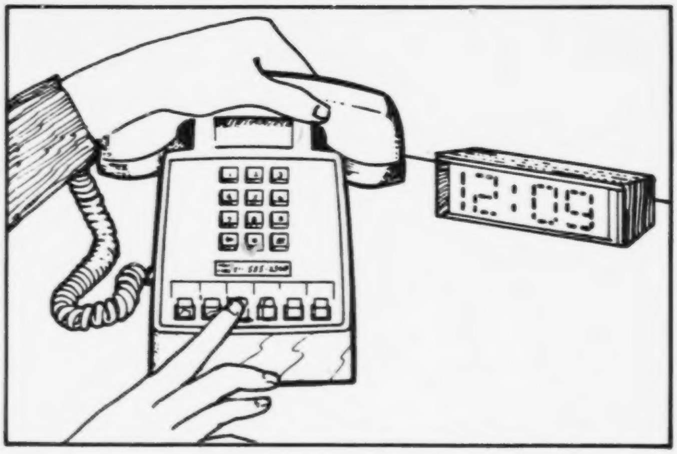
12. Ask the caller if he/she would mind being placed on hold.


"That line is busy now. Would you like to hold?"
"Yes, that's fine."

13. If the caller agrees to being placed on hold, depress the hold button again and hang up the phone.



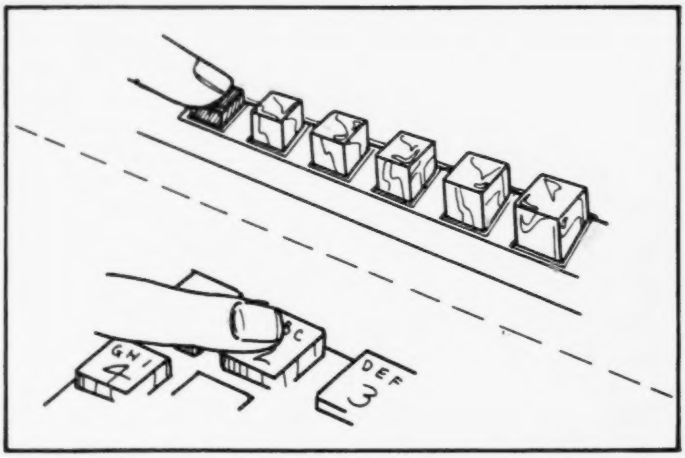
14. Wait about 30 seconds, then reconnect with the caller by depressing the button and lifting the receiver.



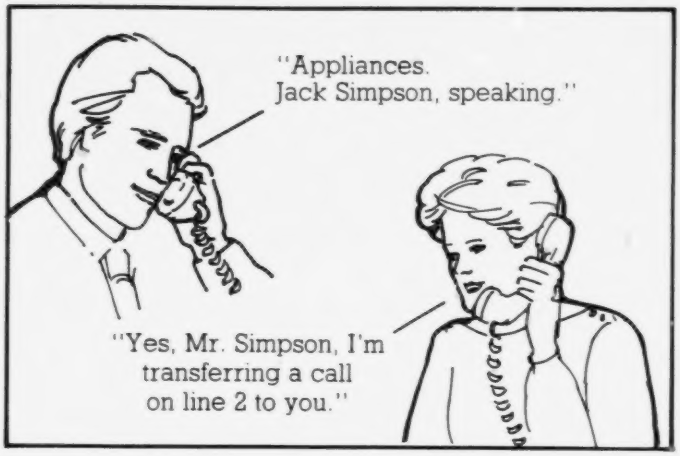
15. Tell the caller that you will try again to buzz the extension.

"I'll try to connect you now."
"Thank you."

16. Depress the hold line to put the caller back on hold and press the appropriate extension number again.



17. When the extension answers, say that you are transferring a call and tell which line it is.


"Appliances.
Jack Simpson, speaking."
"Yes, Mr. Simpson, I'm transferring a call on line 2 to you."

18. Hang up your telephone gently.

**DO ACTIVITY SHEET 1**

## Telephone Techniques
# Activity Sheet 1

**Directions:** Read the following information and then act out the situations described on the following page.

Employees who answer the telephone should remember that they represent the company. They should try to create the feeling that they care about each caller. This "caring" attitude will help callers place more confidence in the employees.

Giving each caller your full attention by listening carefully makes callers feel welcome.

A "caring" attitude and good listening skills can be shown over the telephone:

| Courteous Behavior | How Callers Feel |
|---|---|
| 1. Accept the interruption. | Sometimes when calls come, an employee is not in a good mood because of working toward a deadline or simply not feeling well. These moods should not become part of the phone conversation. Try to put a smile on your face for each caller. |
| 2. Answer promptly. | Answering calls within three rings generally indicates a professionally run organization. |
| 3. Use the caller's name. | This makes the caller feel important. |
| 4. Listen patiently. | Sometimes callers may be unhappy about a product. They must get their complaints "off their chest." Although the problem is not your fault, you must not interrupt. |
| 5. Repeat some of the caller's own words. | The caller will feel that you are sympathetic and that you understand the problem. |
| 6. Apologize briefly. | Sometimes the customer feels that a product or service offered by your company is not perfect. The words "I'm sorry" help to sooth the caller's anger. |
| 7. Ask questions. | Show your willingness to help the caller. Ask the caller for dates, amounts, or other information that will help you to fill requests or solve problems. |

**Directions:** Role play the following situations. Think about how the caller would feel, and demonstrate courteous behaviors listed on the previous page.

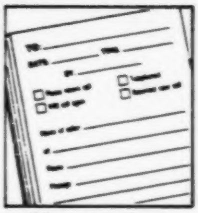
**SITUATION 1:**
You are secretary to Mr. Blue, an accountant who specializes in corporate tax matters. A prospective client calls about personal tax matters. She requests an appointment with Mr. Blue. You know that Mrs. Eastman handles these matters for your firm. You need to transfer the call to Mrs. Eastman's secretary without making the caller feel unwanted.

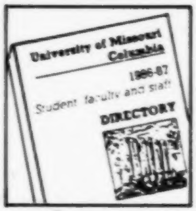
**SITUATION 2:**
A customer has gotten home with what she thought was a super combo deluxe deep pan pizza. She finds when she opens the box that it is sausage pizza. She calls to complain. You need to listen to her story, apologize briefly, and keep her good will.

## C. Steps of Procedure for Handling Telephone Inquiries

1. Assemble equipment.

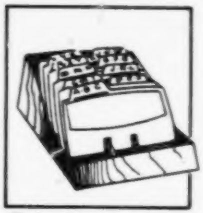
Telephone


Message Pad



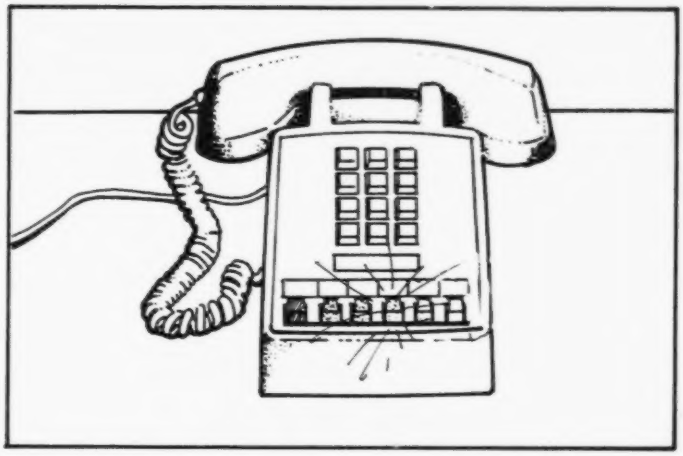
Company Directory

Appointment Calendar


Telephone Index

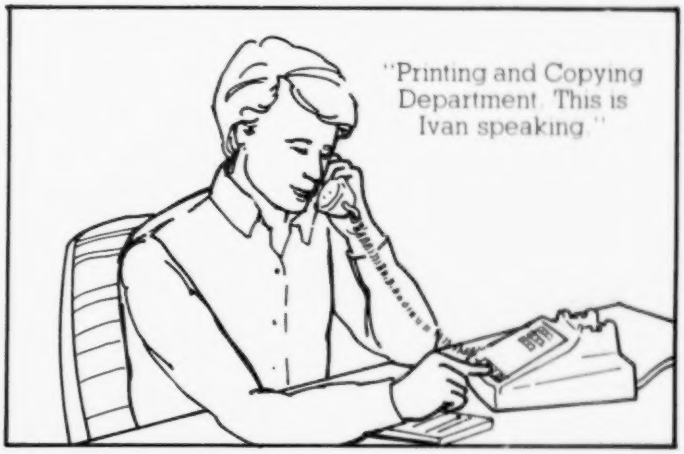
2. Organize your work area.

3. Locate the incoming telephone call. (Usually indicated by the flashing light.)

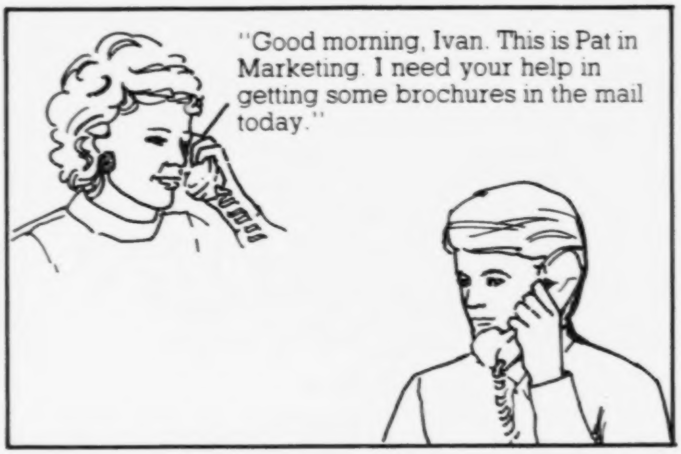


4. Depress the button.

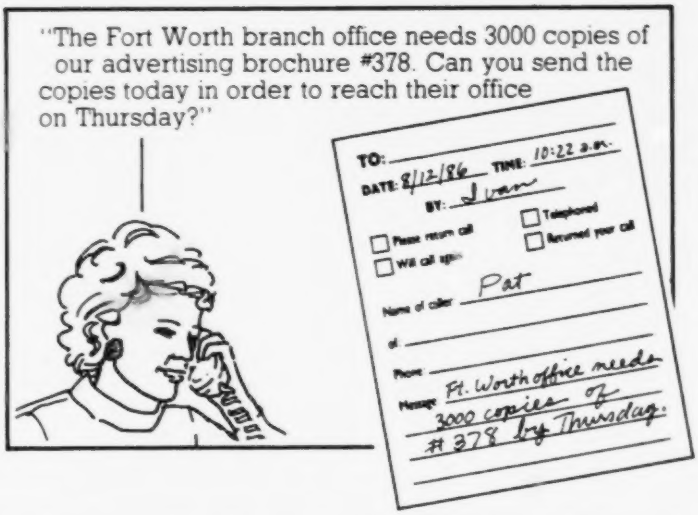
5. Using a cheerful voice, tell the caller the name of your company or department and your name.


"Printing and Copying Department. This is Ivan speaking."

6. Listen carefully to the reason why the person is calling.


"Good morning, Ivan. This is Pat in Marketing. I need your help in getting some brochures in the mail today."

7. Write down details provided by the caller such as dates, numbers, names, and instructions.


"The Fort Worth branch office needs 3000 copies of our advertising brochure #378. Can you send the copies today in order to reach their office on Thursday?"

TO:

DATE: 8/12/86 TIME: 10:22 a.m.

BY: Ivan

☐ Telephoned

☐ Please return call

☐ Returned your call

☐ Will call again

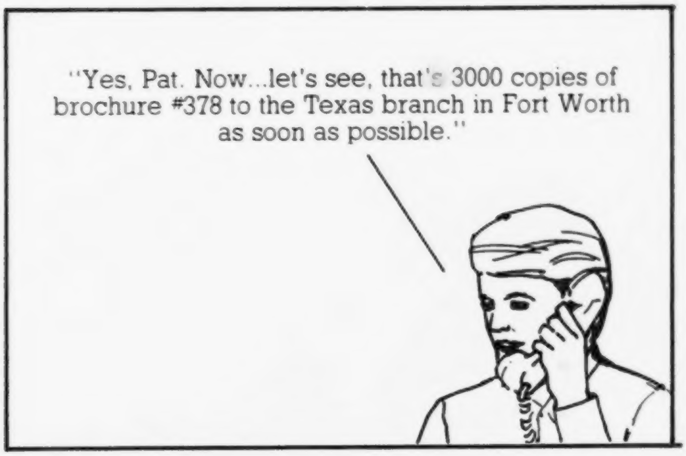
Name of caller Pat

of

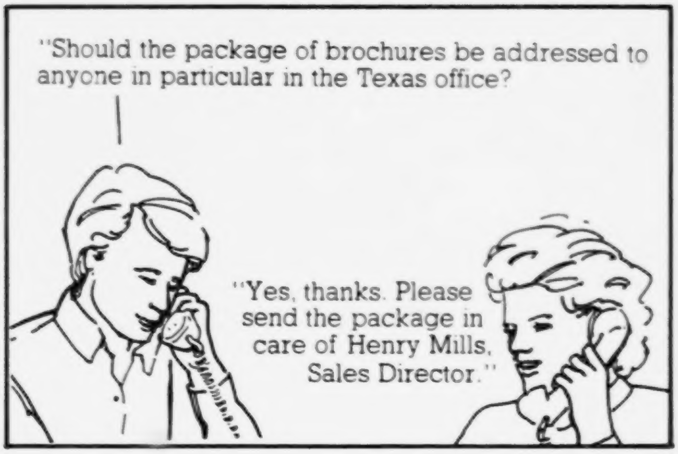
Phone

Message Ft. Worth office needs 3000 copies of #378 by Thursday.

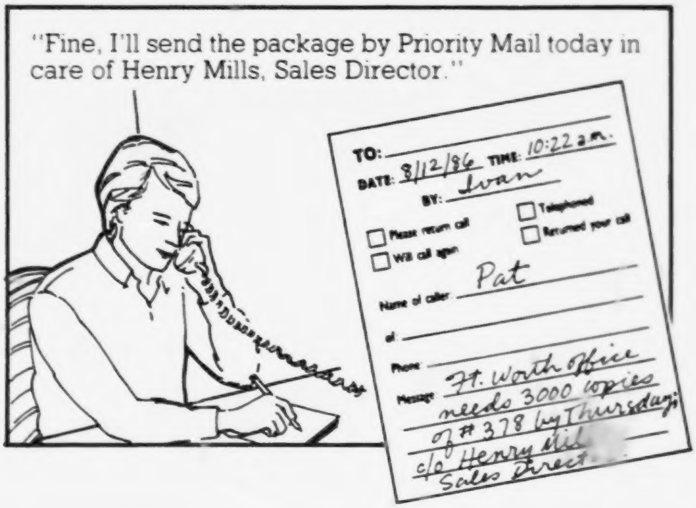
8. Verify information.


"Yes, Pat. Now...let's see, that's 3000 copies of brochure #378 to the Texas branch in Fort Worth as soon as possible."

9. Ask questions.


"Should the package of brochures be addressed to anyone in particular in the Texas office?
"Yes, thanks. Please send the package in care of Henry Mills, Sales Director."

10. Confirm agreements.


"Fine, I'll send the package by Priority Mail today in care of Henry Mills, Sales Director."

TO:
DATE: 8/12/86 TIME: 10:22 a.m.
BY: Ivan
☐ Telephoned
☐ Please return call
☐ Returned your call
☐ Will call again
Name of caller: Pat
of:
Phone:
Message: Ft. Worth office needs 3000 copies of # 378 by Thursday; c/o Henry Mil[illegible] Sales Direct[illegible]

11. End the call pleasantly.

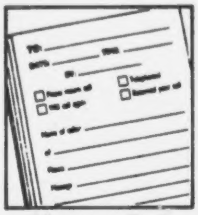
"Thank you, Ivan."
"You're welcome, Pat."

12. Let the caller hang up first then hang up gently.

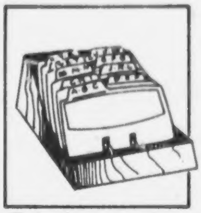
## D. Steps for Taking Telephone Messages

1. Assemble equipment.

Telephone


Message Pad

Appointment Calendar

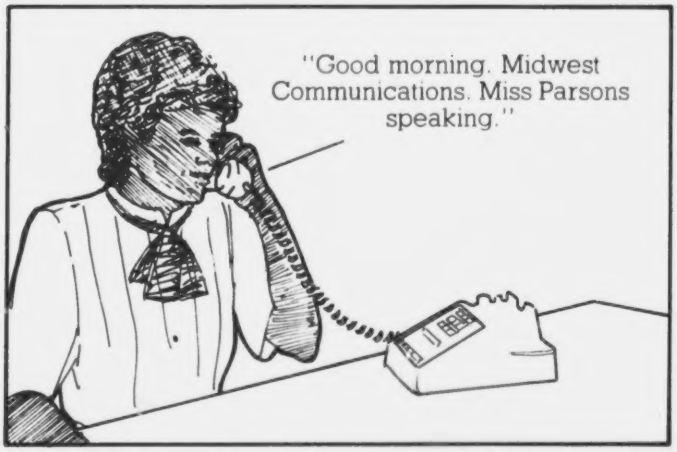

Telephone Index

2. Organize your work area.

3. Locate incoming call (usually indicated by flashing light).

4. Depress the flashing button to connect the call.

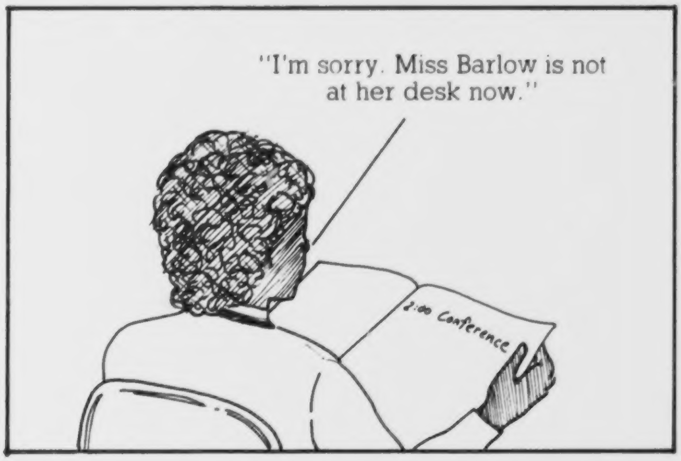
5. Use a cheerful voice and speak clearly as you give a greeting and tell your company's name.


"Good morning. Midwest Communications. Miss Parsons speaking."

6. Determine the nature of the call.

"This is Mrs. Castell speaking. May I speak with Miss Barlow, please."

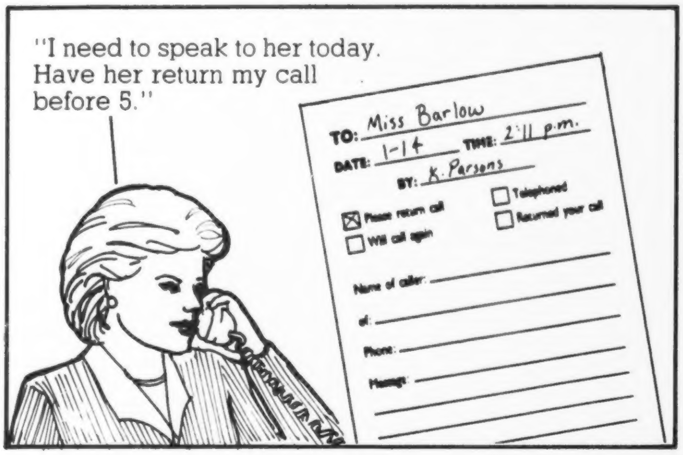
7. If the person for whom the call is intended is not available, make a brief apology.


"I'm sorry. Miss Barlow is not at her desk now."
2:00 Conference

8. Offer to take a message.

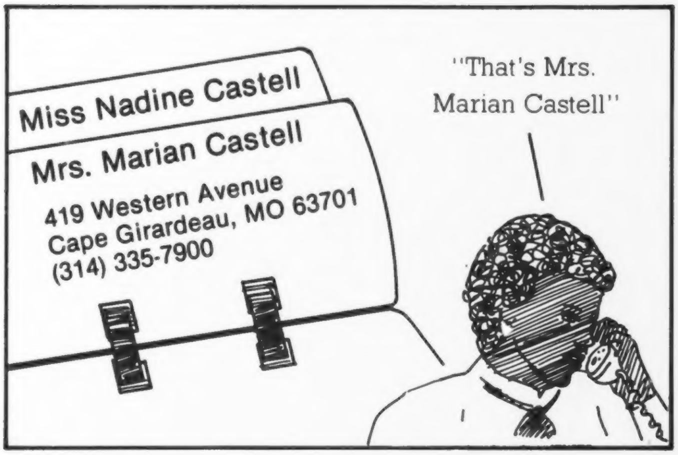
"May I take a message?"
"Yes. Please."

9. Use a message form to help you record information.

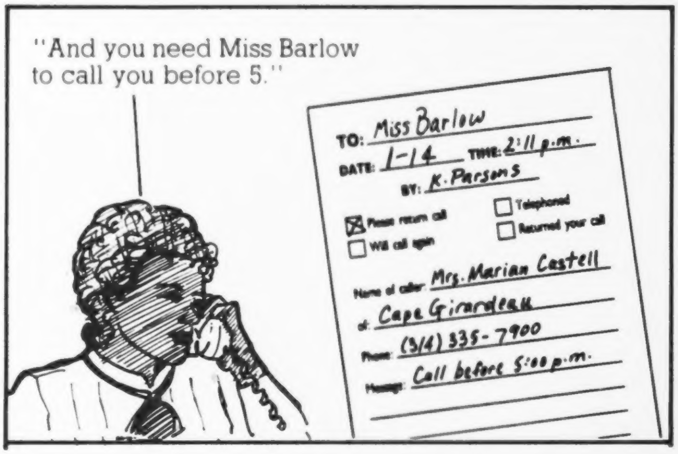

"I need to speak to her today. Have her return my call before 5."

TO: Miss Barlow
DATE: 1-14 TIME: 2:11 p.m.
BY: K. Parsons
☒ Please return call ☐ Telephoned
☐ Will call again ☐ Returned your call
Name of caller:
of:
Phone:
Message:

10. Verify names.

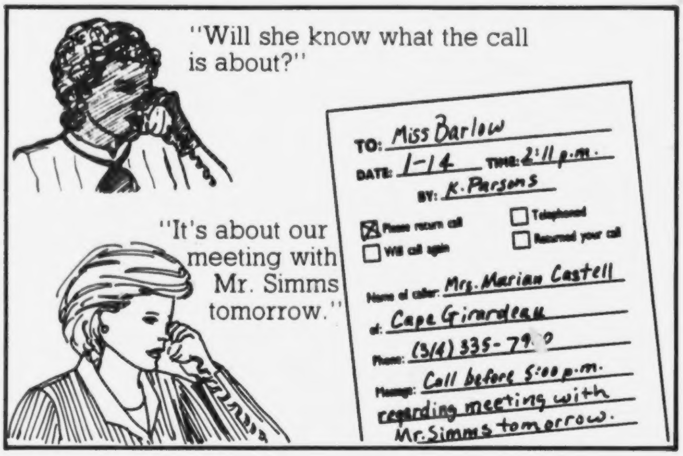


11. Confirm dates and numbers.


"And you need Miss Barlow to call you before 5."

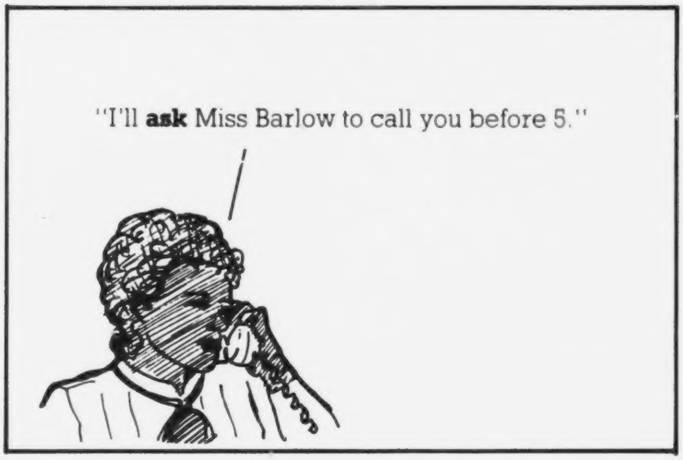
TO: Miss Barlow
DATE: 1-14 TIME: 2:11 p.m.
BY: K. Parsons
☒ Please return call ☐ Telephoned
☐ Will call again ☐ Returned your call
Name of caller: Mrs. Marian Castell
of: Cape Girardeau
Phone: (314) 335-7900
Message: Call before 5:00 p.m.

12. Ask questions.


"Will she know what the call is about?"
"It's about our meeting with Mr. Simms tomorrow."

TO: Miss Barlow
DATE: 1-14 TIME: 2:11 p.m.
BY: K. Parsons
☒ Please return call ☐ Telephoned
☐ Will call again ☐ Returned your call
Name of caller: Mrs. Marian Castell
of: Cape Girardeau
Phone: (314) 335-79[illegible]0
Message: Call before 5:00 p.m. regarding meeting with Mr. Simms tomorrow.

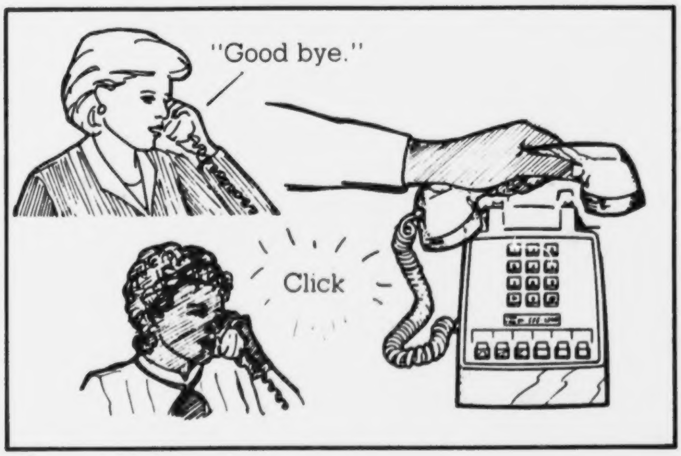
13. Do not promise more than you should.


"I'll **ask** Miss Barlow to call you before 5."

14. End the call pleasantly.

"Thank you."
"You're welcome."

15. Let the caller hang up first; then hang up gently.



16. Deliver the message.

## DO ACTIVITY SHEET 2

# Telephone Techniques
# Activity Sheet 2

Only one out of every four business calls reaches its destination on the first attempt because it is difficult for business people to be available at their desks at all times. Therefore, messages are an accepted part of the communication process. Four guidelines for taking telephone messages are:

1. Use a message form. A scrap of paper may get mixed in with other papers or lost entirely. In addition, a scrap of paper does not contain guide words to help you in taking a complete message.
2. Write the message with great care. Avoid rewriting a message as this increases the chance for errors in transposition or omission. Confirm or repeat names, numbers, and messages as you go. You will be sure to hear everything correctly by slowing down the conversation. This allows enough time for you to write legibly.
3. Know company policy. Many companies prefer that carbon copies be kept for the company files. The copies are kept in a spiral-bound book for future reference about names, telephone numbers, or other facts. The original only is torn out and delivered to the party being called.
4. Deliver the message promptly. Place the message in a prearranged place on a desk or on a telephone message holder.

**Directions:** Read the following conversations. Then ask a classmate to play the role of "Caller." Complete message forms for the conversations.

**Exercise 1:**

*You:* *Good morning. Accounting Department. Miss Hutton's desk; Ms Jones speaking.*

*Caller:* *This is Mr. Roberts. Is Miss Hutton in?*

*You:* *I'm sorry, Mr. Roberts, Miss Hutton is not at her desk.*

*Caller:* *Well, can you give her a message?*

*You:* *I'll be happy to. That's Mr. Roberts in the Sales Department, Extension 2288?*

*Caller:* *Right! Tell her that I need to speak to her before noon.*

*You:* *I see, Mr. Roberts. You want her to call before 12.*
*Will she know what the call is about?*

*Caller:* *It's about the Rhoades Construction account.*

*You:* *Yes, Mr. Roberts. Ill ask her to return your call regarding the Rhoades Construction account. Is that spelled R-H-O-A-D-E-S?*

*Caller:* *Correct! Thanks. Goodbye.*

*You:* *Goodbye, Mr. Roberts.*

Exercise 2:

*You:* *Mr. Adams' office. Jennifer Smith speaking.*

*Caller:* *Yes, This is Mr. Montgomery from ABC Corporation. Is Mr. Adams around?*

*You:* *I'm sorry. Mr. Adams is in a conference which should be completed in about a half hour. Can I take a message?*

*Caller:* *All right. Tell him that address he needed is: Allen Belle...*

*You:* *Is that spelled A-L-A-N?*

*Caller:* *No. A-L-L-E-N. B-E-L-L-E.*

*You:* *Belle with an "e" on the end?*

*Caller:* *Right. 2-2-7 Mosely Boulevard.*

*You:* *2-2-7 M-O-...*

*Caller:* *...S-E-L-Y.*

*You:* *Okay.*

*Caller:* *Sikeston... Missouri... 63801.*

*You:* *Zip Code 6-3-8-0-1.*

*Caller:* *Right. Thanks.*

*You:* *Thank you, Mr. Montgomery. I'll give Mr. Adams the message.*

*Caller:* *Goodbye.*

*You:* *Goodbye.*

**WHILE YOU WERE OUT**

**TO:** ____________________

**DATE:** __________ **TIME:** __________

**BY:** ____________

☐ Please return call ☐ Telephoned

☐ Will call again ☐ Returned your call

Name of caller: ____________________

of: ____________________

Phone: ____________________

Message: ____________________

____________________

____________________

____________________

**WHILE YOU WERE OUT**

**TO:** ____________________

**DATE:** __________ **TIME:** __________

**BY:** ____________

☐ Please return call ☐ Telephoned

☐ Will call again ☐ Returned your call

Name of caller: ____________________

of: ____________________

Phone: ____________________

Message: ____________________

____________________

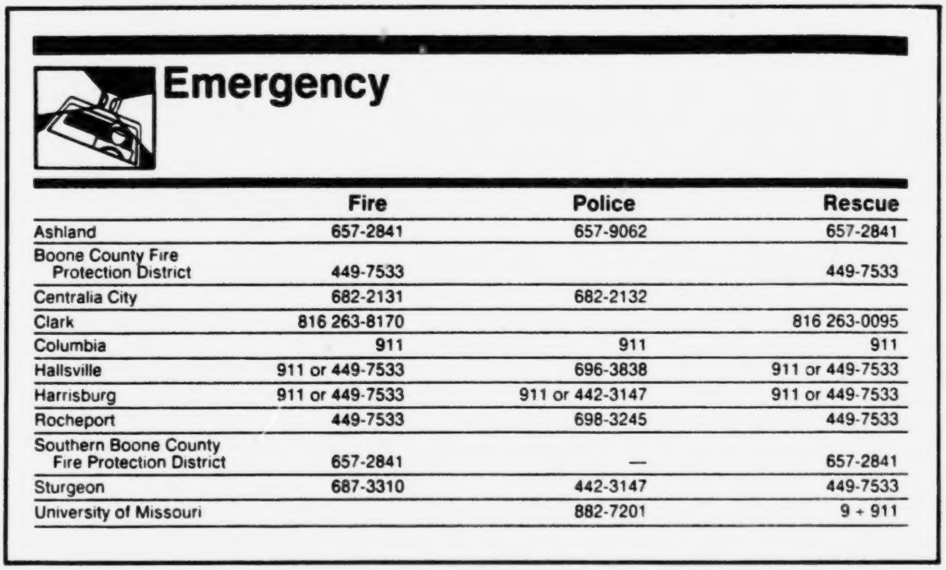
____________________

____________________

## E. Steps for Using the Telephone Directory

A telephone directory is divided into several major sections:

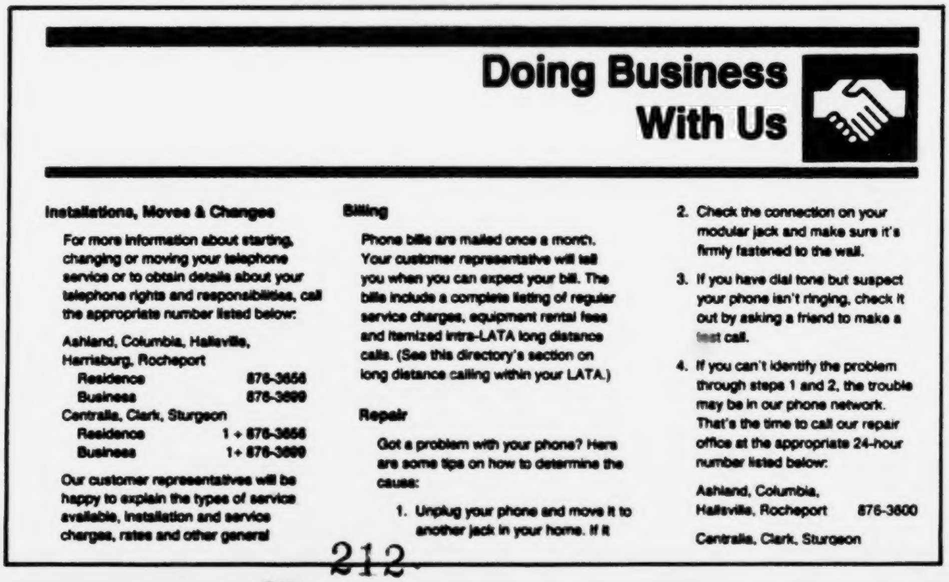
- The inside front cover lists emergency numbers for the cities included in a particular directory.



### Emergency

| | Fire | Police | Rescue |
|---|---|---|---|
| Ashland | 657-2841 | 657-9062 | 657-2841 |
| Boone County Fire Protection District | 449-7533 | | 449-7533 |
| Centralia City | 682-2131 | 682-2132 | |
| Clark | 816 263-8170 | | 816 263-0095 |
| Columbia | 911 | 911 | 911 |
| Hallsville | 911 or 449-7533 | 696-3838 | 911 or 449-7533 |
| Harrisburg | 911 or 449-7533 | 911 or 442-3147 | 911 or 449-7533 |
| Rocheport | 449-7533 | 698-3245 | 449-7533 |
| Southern Boone County Fire Protection District | 657-2841 | — | 657-2841 |
| Sturgeon | 687-3310 | 442-3147 | 449-7533 |
| University of Missouri | | 882-7201 | 9 + 911 |

- The customer guide section includes information about directory assistance, the telephone company's business office, repair service, customer rights, bill payments, safety, installation and service charges, types of calls, area codes and time zones, and international codes.



### Doing Business With Us

**Installations, Moves & Changes**

For more information about starting, changing or moving your telephone service or to obtain details about your telephone rights and responsibilities, call the appropriate number listed below:

Ashland, Columbia, Hallsville,
Harrisburg, Rocheport
Residence 876-3656
Business 876-3699
Centralia, Clark, Sturgeon
Residence 1 + 876-3656
Business 1+ 876-3699

Our customer representatives will be happy to explain the types of service available, installation and service charges, rates and other general

**Billing**

Phone bills are mailed once a month. Your customer representative will tell you when you can expect your bill. The bills include a complete listing of regular service charges, equipment rental fees and itemized intra-LATA long distance calls. (See this directory's section on long distance calling within your LATA.)

**Repair**

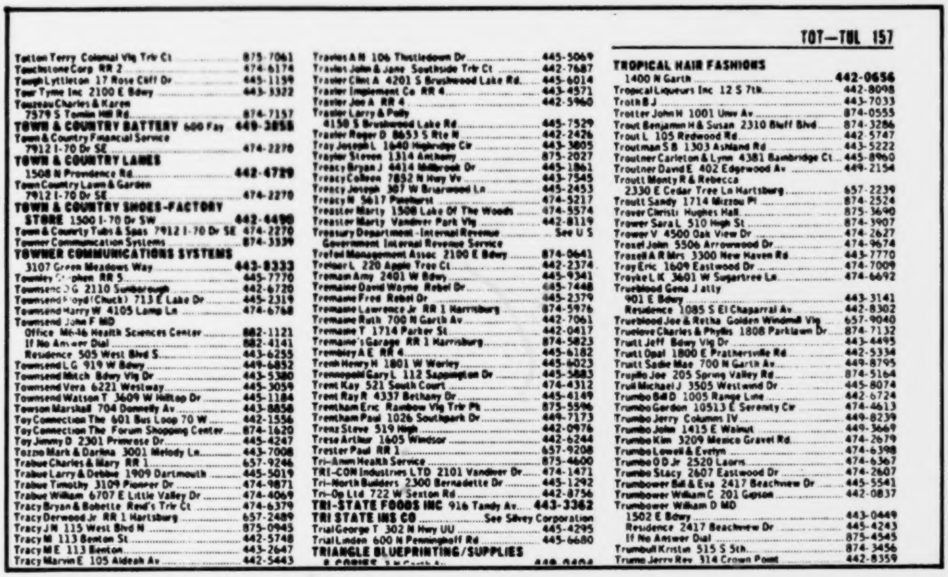
Got a problem with your phone? Here are some tips on how to determine the cause:

1. Unplug your phone and move it to another jack in your home. If it
2. Check the connection on your modular jack and make sure it's firmly fastened to the wall.
3. If you have dial tone but suspect your phone isn't ringing, check it out by asking a friend to make a test call.
4. If you can't identify the problem through steps 1 and 2, the trouble may be in our phone network. That's the time to call our repair office at the appropriate 24-hour number listed below:

Ashland, Columbia,
Hallsville, Rocheport 876-3600

Centralia, Clark, Sturgeon

- The white pages are an alphabetical listing of businesses and people with listed numbers.



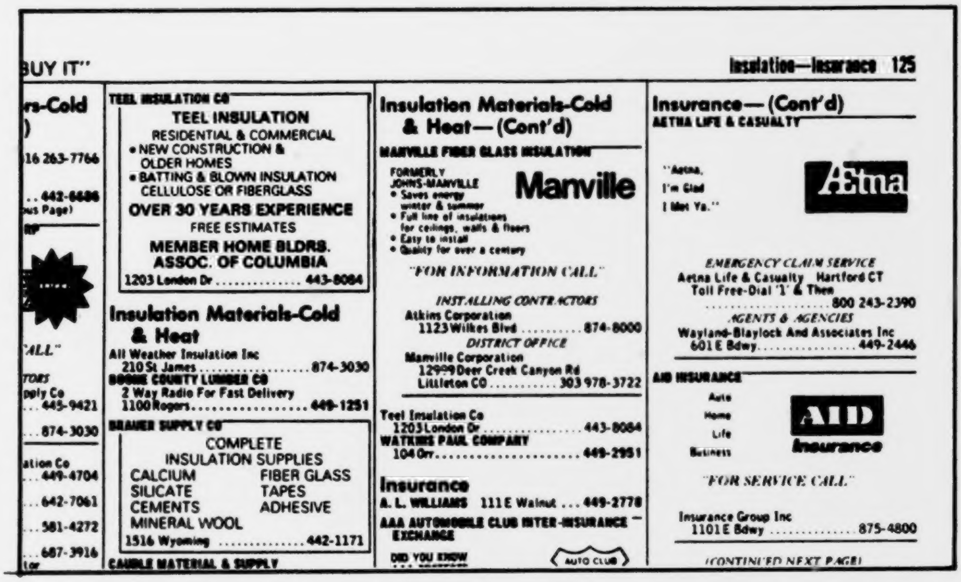
TOT—TUL 157

| | |
|---|---|
| Totton Terry Colonial Vlg Trlr Ct | 875-7061 |
| Touchstone Corp RR 2 | 474-6174 |
| Tough Lyttleton 17 Rose Cliff Dr | 445-1159 |
| Tour Tyme Inc 2100 E Bdwy | 443-3322 |
| Touzeau Charles & Karen | |
| 7579 S Tomlin Hill Rd | 874-7157 |
| **TOWN & COUNTRY BATTERY** 600 Fay | **449-3858** |
| Town & Country Financial Service | |
| 7912 I-70 Dr SE | 474-2270 |
| **TOWN & COUNTRY LANES** | |
| 1508 N Providence Rd | **442-4729** |
| Town Country Lawn & Garden | |
| 7912 I-70 Dr SE | 474-2270 |
| **TOWN & COUNTRY SHOES-FACTORY** | |
| **STORE** 1500 I-70 Dr SW | **442-4490** |
| Town & Country Tubs & Spas 7912 I-70 Dr SE | 474-2270 |
| Towner Communication Systems | 874-3339 |
| **TOWNER COMMUNICATIONS SYSTEMS** | |
| 3107 Green Meadows Way | **443-8333** |
| Townley Stephen RR 5 | 445-7770 |
| Townsend D G 2110 Sunborough | 442-6720 |
| Townsend Floyd (Chuck) 713 E Lake Dr | 445-2319 |
| Townsend Harry W 4105 Lamp Ln | 474-6768 |
| Townsend John F MD | |
| Office M6-16 Health Sciences Center | 882-1121 |
| If No Answer Dial | 882-4141 |
| Residence 505 West Blvd S | 443-6255 |
| Townsend L G 919 W Bdwy | 449-6852 |
| Townsend Mitch Bdwy Vlg Dr | 443-5380 |
| Townsend Vera 6221 Westway | 445-3059 |
| Townsend Watson T 3609 W Hilltop Dr | 445-1184 |
| Towson Marshall 704 Donnelly Av | 443-8858 |
| Toy Connection The 601 Bus Loop 70 W | 442-1556 |
| Toy Connection The Forum Shopping Center | 874-1620 |
| Toy Jimmy D 2301 Primrose Dr | 445-4247 |
| Tozzo Mark & Darlena 3001 Melody Ln | 443-7008 |
| Trabue Charles & Mary RR 1 | 657-9246 |
| Trabue Larry & Debbie 1909 Dartmouth | 445-5019 |
| Trabue Timothy 3109 Pioneer Dr | 474-9871 |
| Trabue William 6707 E Little Valley Dr | 474-4069 |
| Tracy Bryan & Bobette Reed's Trlr Ct | 474-6379 |
| Tracy Derwood Jr RR 1 Hartsburg | 657-2489 |
| Tracy J N 115 West Blvd N | 875-0945 |
| Tracy M 113 Benton St | 442-5748 |
| Tracy M E 113 Benton | 443-2647 |
| Tracy Marvin E 105 Aldeah Av | 442-5443 |

| | |
|---|---|
| Travlos A H 106 Thistledown Dr | 445-5069 |
| Travlos John & Jane Southside Trlr Ct | 442-7687 |
| Traxler Clint A 4201 S Brushwood Lake Rd | 445-6014 |
| Traxler Implement Co RR 4 | 443-4571 |
| Traxler Joe A RR 4 | 442-5960 |
| Traxler Larry & Polly | |
| 4150 S Brushwood Lake Rd | 445-7529 |
| Traxler Roger D 8653 S Rte N | 442-2426 |
| Tray Joseph L 1640 Highridge Cir | 443-3805 |
| Traylor Steven 1314 Anthony | 875-2027 |
| Treacy Bryan J 4414 Millbrook Dr | 445-1861 |
| Treacy Colleen 7852 N Hwy VV | 443-7545 |
| Treacy Joseph 307 W Briarwood Ln | 445-2453 |
| Treacy N 5617 Pinehurst | 474-5217 |
| Treaster Marty 1508 Lake Of The Woods | 474-5574 |
| Treaster Marty Vandiver Park Vlg | 442-8119 |
| Treasury Department - Internal Revenue | See U S |
| Government Internal Revenue Service | |
| Trefoil Management Assoc 2100 E Bdwy | 874-0641 |
| Treiber L 220 Apple Tree Ct | 442-2374 |
| Treman Amy 2401 W Bdwy | 445-9341 |
| Tremaine David Wayne Rebel Dr | 445-7448 |
| Tremaine Fred Rebel Dr | 445-2379 |
| Tremaine Lawrence Jr RR 1 Harrisburg | 874-5976 |
| Tremaine Ruth 700 N Garth Av | 442-7061 |
| Tremaine T 1714 Parker St | 442-0417 |
| Tremaine's Garage RR 1 Harrisburg | 874-5823 |
| Trembley A E RR 4 | 445-6182 |
| Trench Henry H 1801 W Worley | 445-6023 |
| Trennepohl Gary L 112 Sappington Dr | 445-5883 |
| Trent Kay 521 South Court | 474-4312 |
| Trent Ray R 4337 Bethany Dr | 445-4149 |
| Trentham Eric Rainbow Vlg Trlr Pk | 875-5596 |
| Trentham Paul 1026 Southpark Dr | 449-7173 |
| Trenz Steve 519 High | 442-0976 |
| Trese Arthur 1605 Windsor | 442-6244 |
| Trester Paul RR 1 | 657-9208 |
| Tri-Amm Health Service | 875-4600 |
| TRI-CON Industries LTD 2101 Vandiver Dr | 474-1471 |
| Tri-North Builders 2300 Bernadette Dr | 445-1292 |
| Tri-Op Ltd 722 W Sexton Rd | 442-8756 |
| **TRI-STATE FOODS INC** 916 Tandy Av | **443-3362** |
| **TRI STATE INS CO** | See Silvey Corporation |
| Trial George T 302 N Hwy UU | 445-4295 |
| Trial Linden 600 N Penninghoff Rd | 445-6680 |
| **TRIANGLE BLUEPRINTING/SUPPLIES** | |

| | |
|---|---|
| **TROPICAL HAIR FASHIONS** | |
| 1400 N Garth | **442-0656** |
| Tropical Liqueurs Inc 12 S 7th | 442-8098 |
| Troth B J | 443-7033 |
| Trotter John H 1001 Univ Av | 874-0555 |
| Trout Benjamin H & Susan 2310 Bluff Blvd | 874-3286 |
| Trout L 105 Redwood Rd | 442-5747 |
| Troutman S B 1303 Ashland Rd | 443-5222 |
| Troutner Carleton & Lynn 4381 Bambridge Ct | 445-8960 |
| Troutner David E 402 Edgewood Av | 449-2154 |
| Troutt Monty R & Rebecca | |
| 2330 E Cedar Tree Ln Hartsburg | 657-2239 |
| Troutt Sandy 1714 Mizzou Pl | 874-2524 |
| Trover Christi Hughes Hall | 875-3690 |
| Trower Sara L 510 High St | 874-3907 |
| Trower V 4500 Oak View Dr | 474-2627 |
| Troxel John 5506 Arrowwood Dr | 474-9674 |
| Troxell A R Mrs 3300 New Haven Rd | 443-7770 |
| Troy Eric 1609 Eastwood Dr | 474-7009 |
| Troyke L K 3601 W Sugartree Ln | 474-6692 |
| Trueblood Gena J atty | |
| 901 E Bdwy | 443-3141 |
| Residence 1085 S El Chaparral Av | 442-8302 |
| Trueblood Joe & Retha Golden Windmill Vlg | 657-9040 |
| Truelove Charles & Phyllis 1808 Parklawn Dr | 874-7132 |
| Truitt Jeff Bdwy Vlg Dr | 443-4495 |
| Truitt Opal 1800 E Prathersville Rd | 442-5334 |
| Truitt Sadie Mae 700 N Garth Av | 449-8795 |
| Trujillo Joe 205 Spring Valley Rd | 874-5164 |
| Trull Michael J 3505 Westwind Dr | 445-8074 |
| Trumbo Bill D 1005 Range Line | 442-6724 |
| Trumbo Gordon 10513 E Serenity Cir | 474-4613 |
| Trumbo Jerry Columns IV | 449-8239 |
| Trumbo John 1415 E Walnut | 449-3669 |
| Trumbo Kim 3209 Mexico Gravel Rd | 474-2679 |
| Trumbo Lowell & Evelyn | 474-6398 |
| Trumbo O D Jr 2520 Laurn | 474-6367 |
| Trumbo Stacy 2607 Eastwood Dr | 474-2607 |
| Trumbower Bill & Eva 2417 Beachview Dr | 445-5541 |
| Trumbower William C 201 Gipson | 442-0837 |
| Trumbower William D MD | |
| 1502 E Bdwy | 443-0449 |
| Residence 2417 Beachview Dr | 445-4243 |
| If No Answer Dial | 875-4545 |
| Trumbull Kristin 515 S 5th | 874-3456 |
| Trump Jerry Rev 314 Crown Point | 442-8359 |

- The yellow pages present an alphabetical listing of businesses only. The list is arranged by subject or topic.



BUY IT''

Insulation—Insurance 125

rs-Cold
)
16 263-7766
... 442-6686
us Page)
'ALL''
TORS
pply Co
... 445-9421
... 874-3030
ation Co
... 449-4704
... 642-7061
... 581-4272
... 687-3916
tor

TEEL INSULATION CO

TEEL INSULATION
RESIDENTIAL & COMMERCIAL
- NEW CONSTRUCTION & OLDER HOMES
- BATTING & BLOWN INSULATION CELLULOSE OR FIBERGLASS

OVER 30 YEARS EXPERIENCE
FREE ESTIMATES
MEMBER HOME BLDRS. ASSOC. OF COLUMBIA
1203 London Dr ... 443-8084

**Insulation Materials-Cold & Heat**

All Weather Insulation Inc
210 St James ... 874-3030

BOONE COUNTY LUMBER CO
2 Way Radio For Fast Delivery
1100 Rogers ... 449-1251

BRAUER SUPPLY CO

COMPLETE
INSULATION SUPPLIES
CALCIUM SILICATE CEMENTS
MINERAL WOOL
FIBER GLASS
TAPES
ADHESIVE
1516 Wyoming ... 442-1171

CAUBLE MATERIAL & SUPPLY

**Insulation Materials-Cold & Heat—(Cont'd)**

MANVILLE FIBER GLASS INSULATION

FORMERLY
JOHNS-MANVILLE
Manville
- Saves energy winter & summer
- Full line of insulations for ceilings, walls & floors
- Easy to install
- Quality for over a century

*"FOR INFORMATION CALL"*

*INSTALLING CONTRACTORS*
Atkins Corporation
1123 Wilkes Blvd ... 874-8000

*DISTRICT OFFICE*
Manville Corporation
12999 Deer Creek Canyon Rd
Littleton CO ... 303 978-3722

Teel Insulation Co
1203 London Dr ... 443-8084

WATKINS PAUL COMPANY
104 Orr ... 449-2951

**Insurance**

A. L. WILLIAMS 111 E Walnut ... 449-2778

AAA AUTOMOBILE CLUB INTER-INSURANCE — EXCHANGE

DID YOU KNOW

AUTO CLUB

**Insurance—(Cont'd)**

AETNA LIFE & CASUALTY

''Aetna,
I'm Glad
I Met Ya.''

Ætna

*EMERGENCY CLAIM SERVICE*
Aetna Life & Casualty Hartford CT
Toll Free-Dial '1' & Then ... 800 243-2390

*AGENTS & AGENCIES*
Wayland-Blaylock And Associates Inc
601 E Bdwy ... 449-2446

AID INSURANCE

Auto
Home
Life
Business

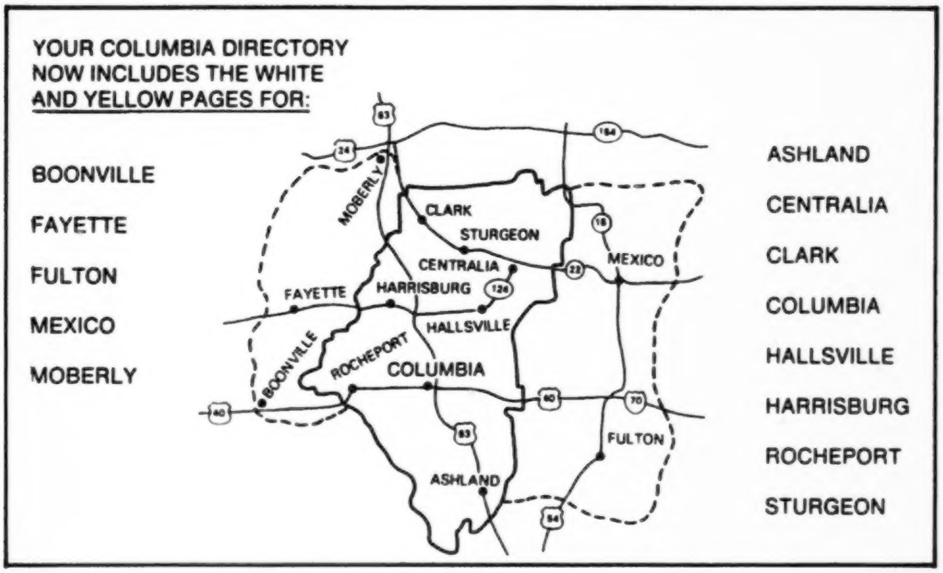
AID Insurance

*"FOR SERVICE CALL"*

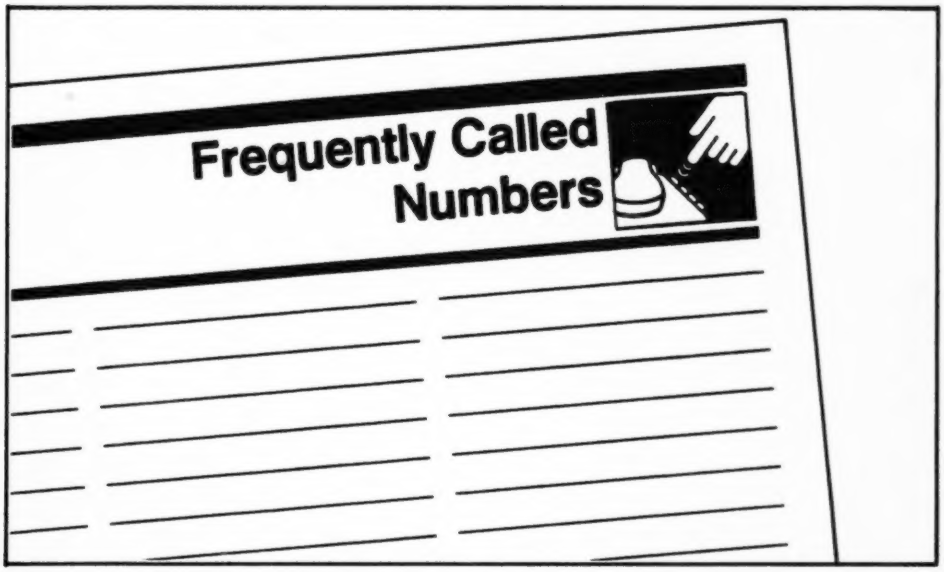
Insurance Group Inc
1101 E Bdwy ... 875-4800

(CONTINUED NEXT PAGE)

- The appendix can include maps of the cities serviced by a particular directory.

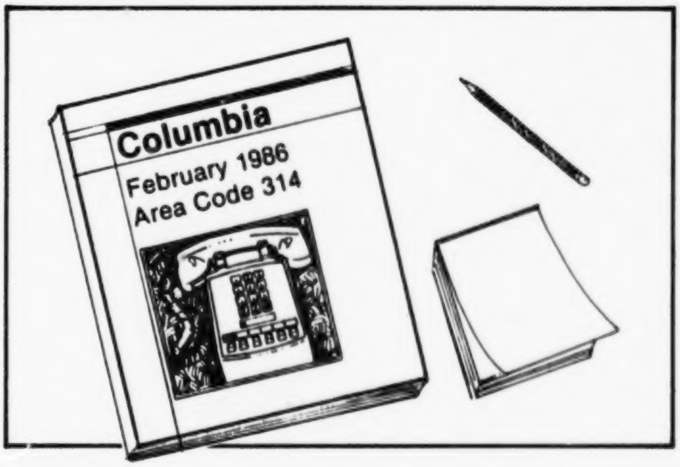


- The inside back cover provides space for writing frequently called numbers.

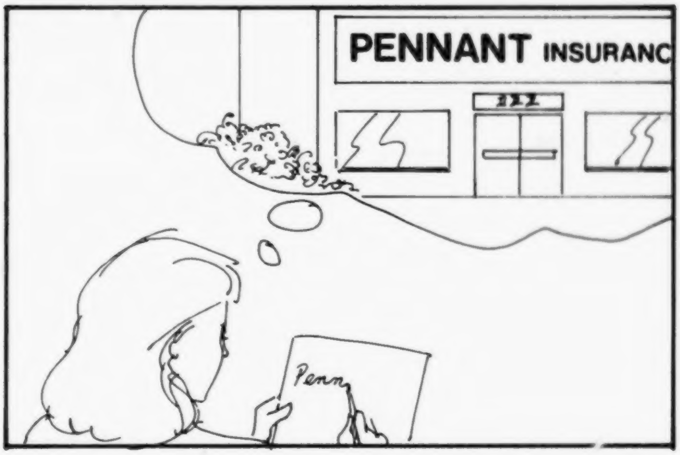


To locate the telephone number of a **person** or **business**, follow these steps:

1. Gather the necessary supplies (note pad, pencil, and telephone directory).



2. Determine the exact name of the person or business you must contact.

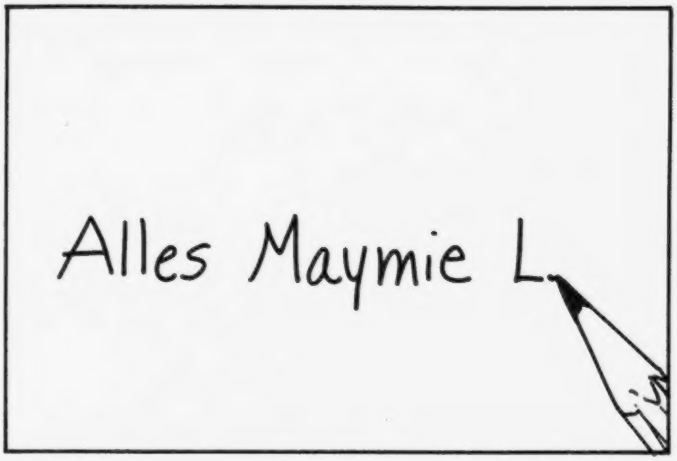


**NOTE:** Study the following list of abbreviations and the corresponding list of names which are spelled out in full.

| Abbreviation | Correct Spelling |
|---|---|
| Chas. | Charles |
| Danl. | Daniel |
| Edw. | Edward |
| Geo. | George |
| Jas. | James |
| Jos. | Joseph |
| Robt. | Robert |
| Thos. | Thomas |
| Wm. | William |

3. Determine the indexing order of the name or title.
4. Write down the person's last name, first name, and initial.

**Example: Maymie Lowis Alles**

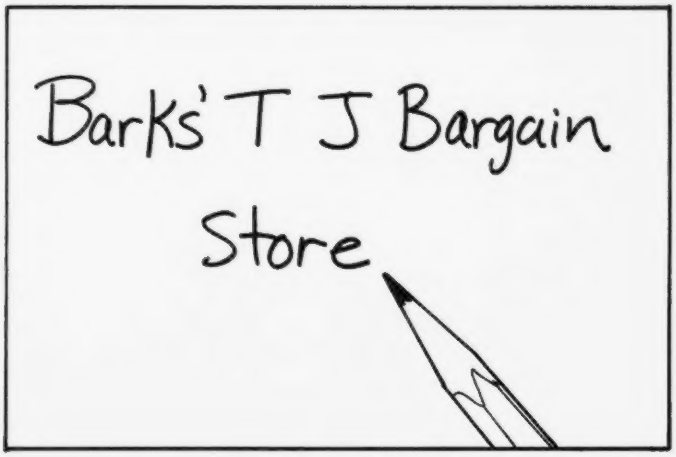


5. Write down the title of a company as it appears unless a name is part of the title.

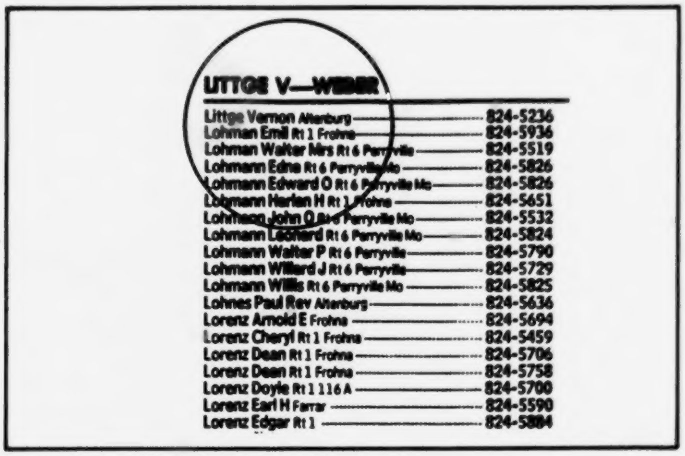
**Example: Bakers Finer Foods**

6. When a name is part of the title of a company, write down the person's last name, first name, and initial. Continue writing out the remainder of the title.

**Example: T.J. Barks' Bargain Store**



7. Turn to the white pages of the telephone directory and look for the guide words at the top of the pages.
8. Determine if the name you are searching for will fit between these guide words.



LITTGE V—WEBER

| | |
|---|---|
| Littge Vernon Altenburg | 824-5236 |
| Lohman Emil Rt 1 Frohna | 824-5936 |
| Lohman Walter Mrs Rt 6 Perryville | 824-5519 |
| Lohmann Edna Rt 6 Perryville Mo | 824-5826 |
| Lohmann Edward O Rt 6 Perryville Mo | 824-5826 |
| Lohmann Harlan H Rt 1 Frohna | 824-5651 |
| Lohmann John O Rt 6 Perryville Mo | 824-5532 |
| Lohmann Leonard Rt 6 Perryville Mo | 824-5824 |
| Lohmann Walter P Rt 6 Perryville | 824-5790 |
| Lohmann Willard J Rt 6 Perryville | 824-5729 |
| Lohmann Willis Rt 6 Perryville Mo | 824-5825 |
| Lohnes Paul Rev Altenburg | 824-5636 |
| Lorenz Arnold E Frohna | 824-5694 |
| Lorenz Cheryl Rt 1 Frohna | 824-5459 |
| Lorenz Dean Rt 1 Frohna | 824-5706 |
| Lorenz Dean Rt 1 Frohna | 824-5758 |
| Lorenz Doyle Rt 1 116 A | 824-5700 |
| Lorenz Earl H Farrar | 824-5590 |
| Lorenz Edgar Rt 1 | 824-5884 |

9. Look through the alphabetical listing of the page with the most appropriate guide words until the name or title is found.

Albert - Amick

| | |
|---|---|
| Albert James | 335-7897 |
| Albrecht Kenneth | 335-4558 |
| Aldridge Daniel | 334-5977 |
| Aldridge Supplies | 335-1109 |
| Alexander Stacy | 335-1888 |
| Allen Lonnie | 335-3887 |
| Allen Richard | 651-7072 |
| → Alles Maymie L. | 335-1366 |
| Alma Larry | 651-6599 |
| Alpers David | 651-4418 |

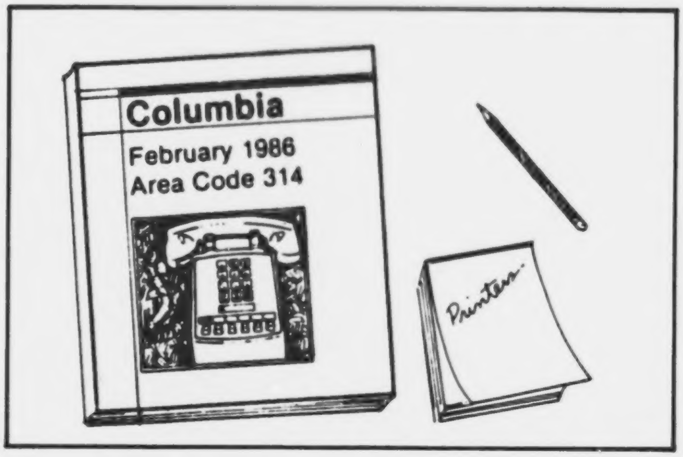
10. Write down the correct telephone number from the directory.

Alles Maymie L

335-1366

To locate information about a particular product or service listed in the yellow pages, follow these steps:

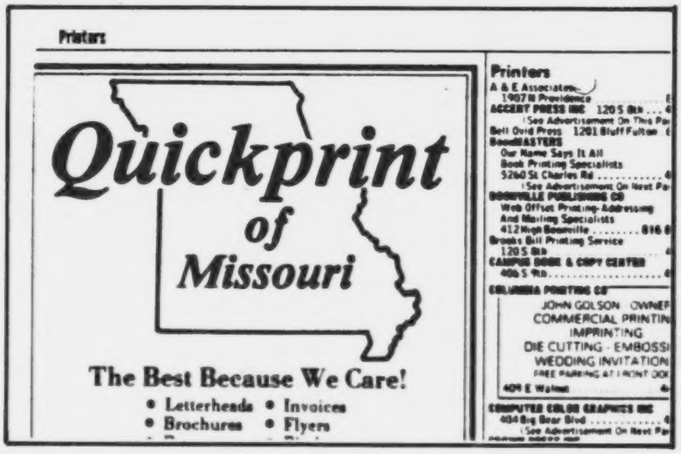
1. Gather the necessary supplies. (telephone directory, pencil, note pad)



2. Determine the topic for which you seek information or service.

   Example: If your office needs to have additional stationery printed, the appropriate topic might be "Printers." Also consider other headings which could be checked.

   **NOTE:** Locate the yellow pages index if it is available.



Printers

Quickprint of Missouri

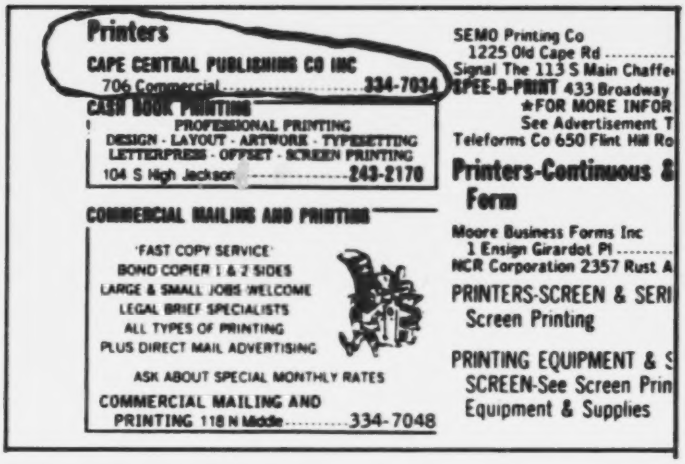
The Best Because We Care!

- Letterheads • Invoices
- Brochures • Flyers

**Printers**

A & E Associates
1907 N Providence
ACCENT PRESS INC 120 S 8th
(See Advertisement On This Pa
Bell Ovid Press 1201 Bluff Fulton
BookMASTERS
Our Name Says It All
Book Printing Specialists
5260 St Charles Rd
(See Advertisement On Next Pa
BOONVILLE PUBLISHING CO
Web Offset Printing-Addressing
And Mailing Specialists
412 High Boonville ........ 816
Brooks Bill Printing Service
120 S 8th
CAMPUS BOOK & COPY CENTER
406 S 9th
COLUMBIA PRINTING CO
JOHN GOLSON OWNE
COMMERCIAL PRINTIN
IMPRINTING
DIE CUTTING - EMBOSSI
WEDDING INVITATION
FREE PARKING AT FRONT DO
409 E Walnut
COMPUTER COLOR GRAPHICS INC
404 Big Bear Blvd
(See Advertisement On Next Pa

3. Look for the heading "Printers" and select the business or businesses you wish to call.



**Printers**

CAPE CENTRAL PUBLISHING CO INC
706 Commercial .................. 334-7034

CASH BOOK PRINTING
PROFESSIONAL PRINTING
DESIGN - LAYOUT - ARTWORK - TYPESETTING
LETTERPRESS - OFFSET - SCREEN PRINTING
104 S High Jackson .............. 243-2170

COMMERCIAL MAILING AND PRINTING
'FAST COPY SERVICE'
BOND COPIER 1 & 2 SIDES
LARGE & SMALL JOBS WELCOME
LEGAL BRIEF SPECIALISTS
ALL TYPES OF PRINTING
PLUS DIRECT MAIL ADVERTISING
ASK ABOUT SPECIAL MONTHLY RATES
COMMERCIAL MAILING AND PRINTING 118 N Middle .......... 334-7048

SEMO Printing Co
1225 Old Cape Rd ..........
Signal The 113 S Main Chaffe
SPEE-D-PRINT 433 Broadway
★FOR MORE INFOR
See Advertisement T
Teleforms Co 650 Flint Hill Ro

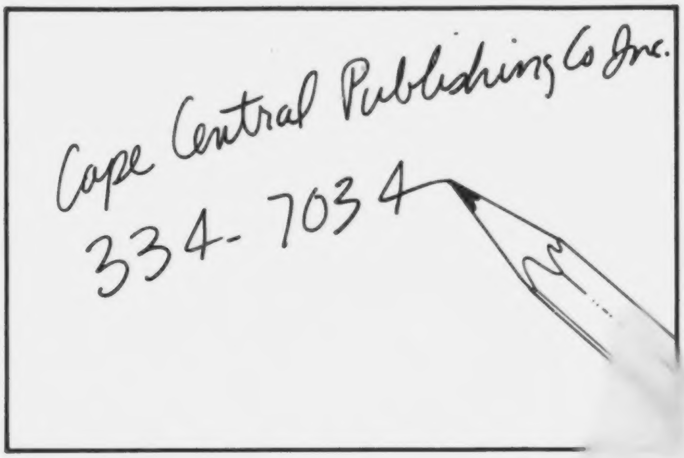
**Printers-Continuous Form**

Moore Business Forms Inc
1 Ensign Girardot Pl ..........
NCR Corporation 2357 Rust A

PRINTERS-SCREEN & SERI
Screen Printing

PRINTING EQUIPMENT & S
SCREEN-See Screen Prin
Equipment & Supplies

4. Write down the telephone numbers and names of the businesses.
5. Make the calls or turn the information over to the person requesting it.


Cape Central Publishing Co Inc.
334-7034

**DO SKILL SHEET 1**

# Telephone Techniques
# Skill Sheet 1

**Directions:** Rewrite the following names giving last name, first name, and middle initial. Spell out all abbreviations.

1. Geo. K. Abscher ______________________
2. Thos. S. Allen ______________________
3. Jas. L. Alderman ______________________
4. Chas. O. Baker ______________________
5. Edw. R. Barks ______________________
6. Wm. S. Barton ______________________
7. Danl. M. Beard ______________________

**Directions:** Use your local telephone directory to find a telephone number for each of the following situations.

8. A secretary needs to check the prices of desks for her office. What topic should she look under? ______________________

   What guide-words are at the top of the correct page in the directory? ______________________

   What is the name of one business she should call? ______________________

   What is the telephone number? ______________________

9. Your employer needs a letter delivered within 24 hours. What topic would you look under in your directory? ______________________
   List the names and telephone numbers of at least two businesses which provide such a service.

| BUSINESS | TELEPHONE NUMBER |
|---|---|
| | |
| | |

220

# Telephone Techniques
# Unit Review

**Directions:** Provide the best answer for each question.

1. An incoming telephone call is indicated by:
   a. a flashing red light
   b. a flashing yellow light
   c. a red light
   d. a yellow light

2. What is meant by the phrase "answer promptly"?

   ______________________________________________

   ______________________________________________

   ______________________________________________

3. Which phrase is a greeting?
   a. "Ivan speaking."
   b. "This is Mrs. Castell speaking."
   c. "Good afternoon."

4. Restating and/or spelling names over the telephone is known as:
   a. verifying names
   b. confirming data

5. List four of the seven parts of a telephone directory.
   a. ______________________
   b. ______________________
   c. ______________________
   d. ______________________

6. Write the spellings for these abbreviations.
   a. Wm. ______________________
   b. Jos. ______________________
   c. Chas. ______________________

7. List three ways that a receptionist can demonstrate that he or she has been listening carefully to the caller.
   a. ______________________________________
   b. ______________________________________
   c. ______________________________________

**Directions:** Circle the best responses to the following questions.

8. Which names are in correct indexing order?
   a. Farmer E.K.
   b. Faust Machine Company
   c. William Finch
   d. Screen Arts Incorporated
   e. Schlitt Charles Insurance
   f. Save-A-Lot
   g. Mrs. Lila Schwab

9. Which of these last names would be found on a page with the guide words "Pruitt-Ramp"?
   a. Quade
   b. Pry
   c. Radiator Service
   d. Richards
   e. Rader
   f. Ratliff

10. In your local telephone directory, the telephone number for the park department for your city or county is: ____________________

11. Study the conversation below. Assume that you are the secretary. Write a note to yourself that includes all of the information you will need in order to complete the request.

| Secretary | Caller |
|---|---|
| Good morning. Mr. West's office. | This is Mrs. Andrews in the accounting department. May I speak with Mr. West? |
| I'm sorry, Mrs. Andrews, Mr. West is not available now. This is Susan Hall, his secretary. Could I take a message? | Well, no. I really wanted to talk to him about our meeting Thursday afternoon. |
| I see Mrs. Andrews. That's the meeting with the computer consultant. | That's right! Maybe you could help me. I need a copy of the equipment list that the consultant left with Mr. West. |
| Yes, Mrs. Andrews. I was working on that folder just now, and the equipment list is right here. | Good. Can you put a copy of it in the company mail for me today? |
| Of course, Mrs. Andrews. | All right! Thanks, Susan. |
| You're welcome. | Goodbye. |
| Goodbye, Mrs. Andrews. | |

**TO:** ______________________

**DATE:** __________ **TIME:** __________

**BY:** ______________

☐ Please return call ☐ Telephoned

☐ Will call again ☐ Returned your call

Name of caller: ______________________

of: ______________________

Phone: ______________________

Message: ______________________

______________________

______________________

______________________

# Telephone Techniques
# Performance Checklist

Student ______________________________ has successfully performed the following steps of procedure.

| Telephone Techniques | Yes | No | Comments |
|---|---|---|---|
| 1. Identified and assembled equipment | | | |
| 2. Located the incoming call | | | |
| 3. Pressed the button for the line with the incoming call | | | |
| 4. Answered before the third ring | | | |
| 5. Used a cheerful voice | | | |
| 6. Used clear speech | | | |
| 7. Listened to the reason for the call | | | |
| 8. Transferred calls by: | | | |
| finding the appropriate extension number | | | |
| stating the extension number to the caller | | | |
| dialing the extension number | | | |
| placing the caller on hold if necessary | | | |
| checking back with the caller within 60 seconds | | | |
| telling the extension that a call is being transferred | | | |
| 9. Handled inquiries by: | | | |
| writing down details such as dates | | | |
| verifying spelling of names | | | |
| confirming information | | | |
| asking for further details | | | |
| confirming agreements | | | |
| 10. Took telephone message by filling in message form completely with: | | | |
| name of person to receive the message | | | |
| date and time of call | | | |
| name of caller | | | |
| phone number of caller | | | |
| action desired | | | |
| key information of message | | | |
| initials of person taking the message | | | |
| 11. Ended conversation pleasantly | | | |
| 12. Allowed the caller to hang up first | | | |
| 13. Replaced the receiver | | | |
| 14. Delivered any messages | | | |

Satisfactory - Should Move On ☐
Repeat This Unit ☐

______________________________
Student Signature/Date

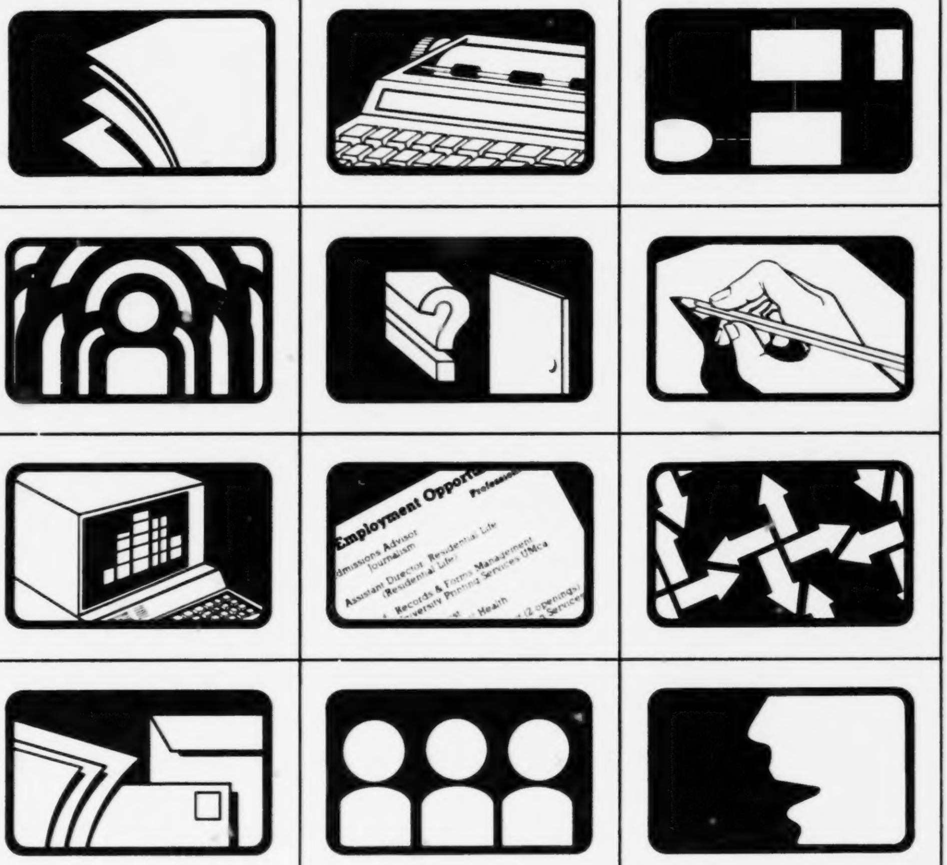
______________________________
Instructor Signature/Date

SN-92-S

SUPPLEMENTARY UNITS FOR
SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

# Using Basic Business Math

## Unit 6



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## Using Basic Business Math
# Introduction

The ability to use electronic calculators is required for most entry-level clerical/secretarial jobs. Using the touch system, operating the 10 numeric keys and some of the function keys without having to look at the keyboard constantly, saves time. For example, the operator can point to a math problem with one hand and enter the numbers on the calculator with the other hand. By not having to look away from the paper, the operator does not lose his or her place when working with several numbers.

This unit will introduce the touch system, the numeric keys, and several function keys. The unit will also show you how to compute subtotals, totals, percentages, and discounts.

---

## Unit Objective

After completion of this unit, you should be able to solve business math problems using the touch system on an electronic calculator.

## Specific Objectives

After completion of this unit, you should be able to:

1. Use the electronic calculator to compute addition, subtraction, and multiplication subtotals or totals.
2. Use the electronic calculator to calculate percentages.
3. Use the electronic calculator to calculate discounts.

---

## Are You Ready?

Check the statement which is true for you.

| | |
|---|---|
| ☐<br>I want to study the information in this unit before doing the Performance Checklist.<br>**TURN TO NEXT PAGE AND BEGIN** | ☐<br>I can do the above tasks and I am ready to do the Performance Checklist.<br>**SEE YOUR INSTRUCTOR** |

## A. Terms and Equipment for Business Math

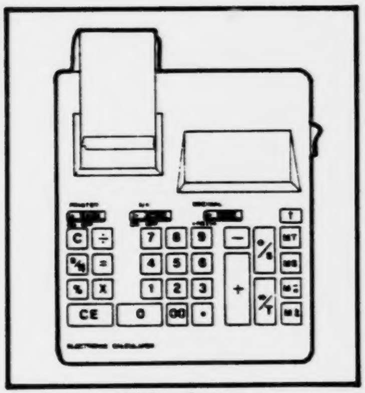
### Terms

1. Clear key - tap the clear key before each new problem.

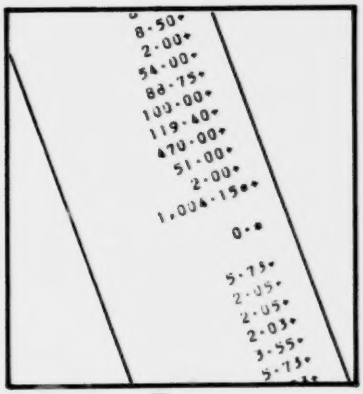
2. Function keys - keys such as addition, subtraction, subtotal, total, and equal. When these keys are pressed, the calculator will automatically carry out the arithmetic operation.

3. Home row keys - the numeric keys of 4, 5, and 6. These keys may be a different shade or color, may be shaped differently than other keys, or perhaps only the 5 has a raised dot. These differing designs help the operator feel that the hand is in the correct position.

### Equipment

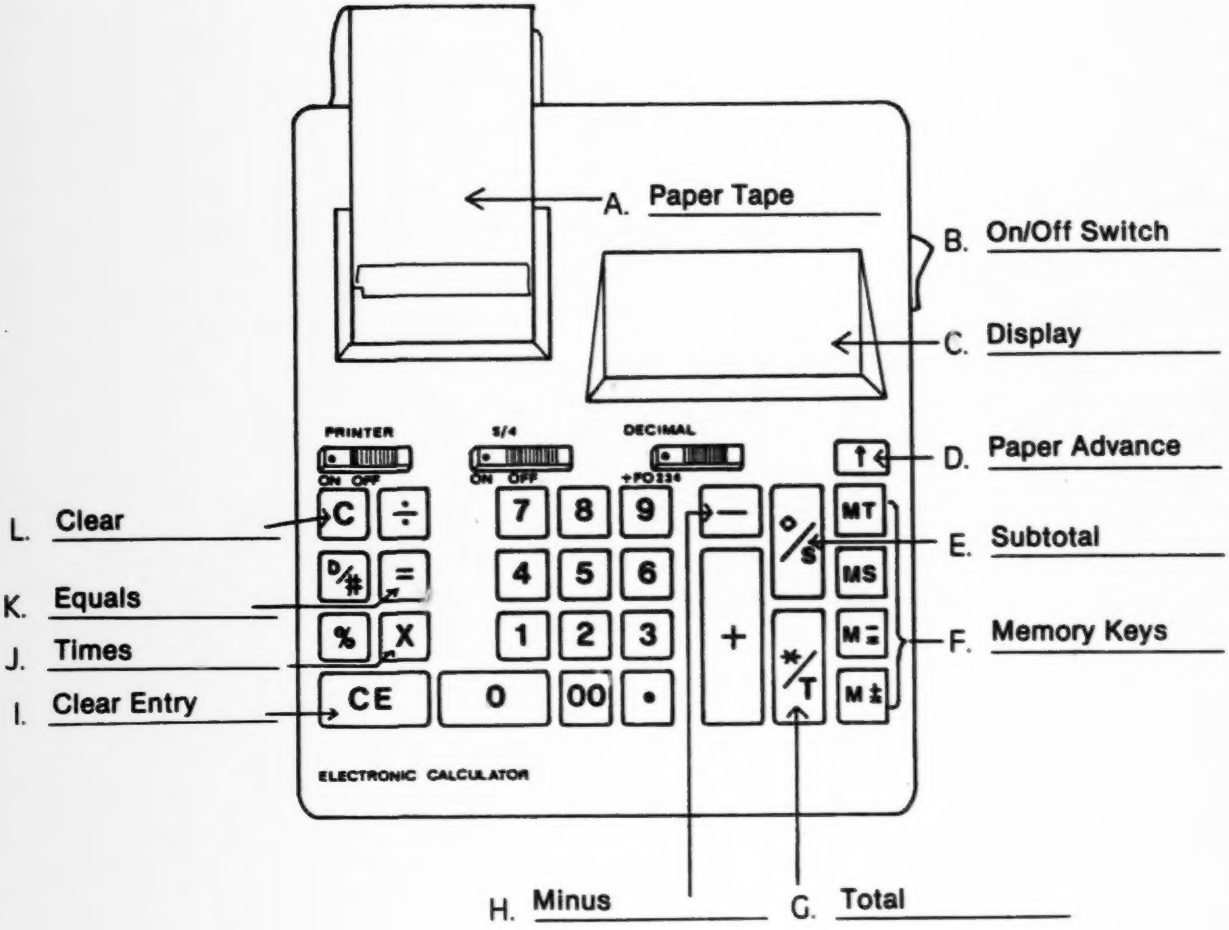


Calculator



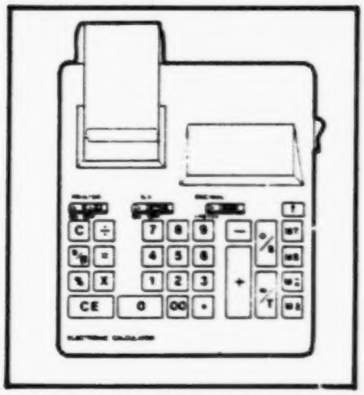
Tape

## Parts of the Electronic Keyboard

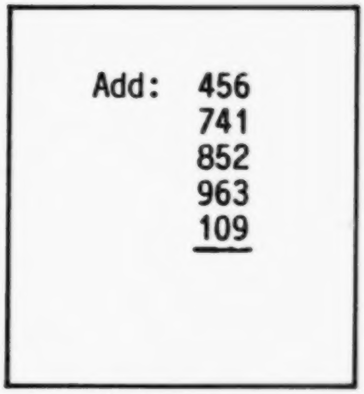


## B. Steps for Computing Subtotals and Totals Featuring Addition

1. Clear your work area.
2. Assemble equipment and supplies.

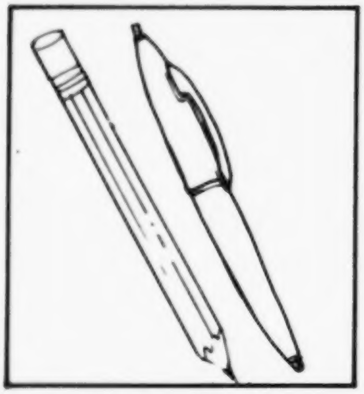


Printer/Display Calculator



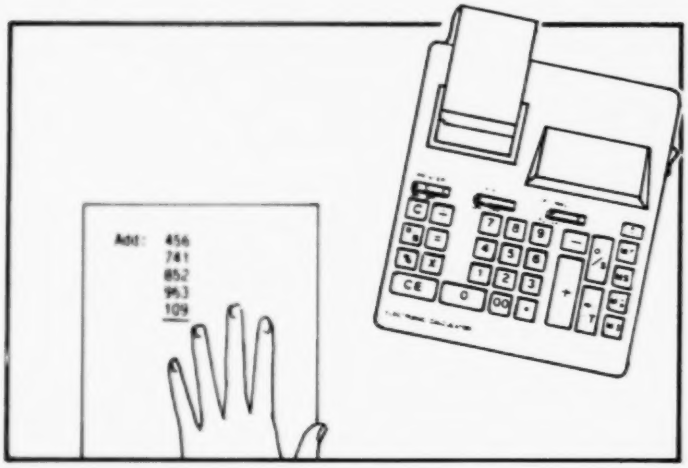
Add: 456
741
852
963
109

Assignment

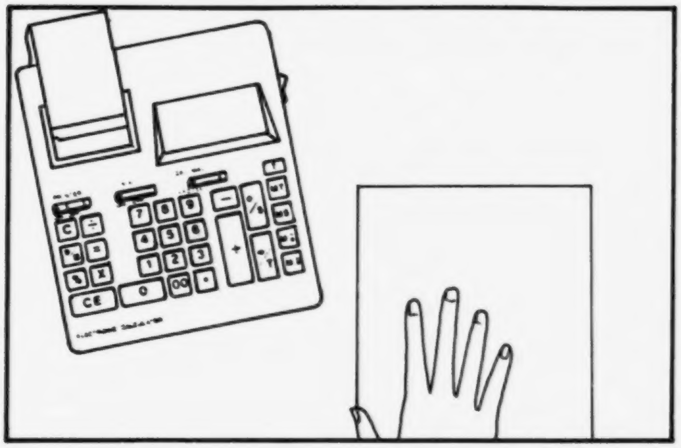


Pen or Pencil

3. Place your assignment to the left of the calculator and turn the calculator slightly to the right if you are right handed.

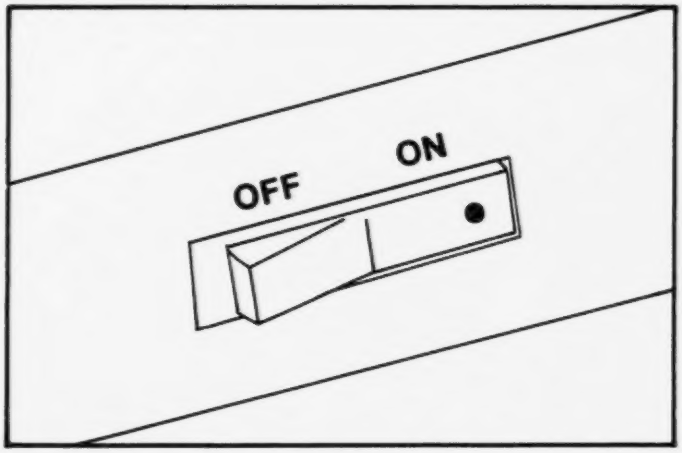


**NOTE:** Reverse the positions if you are left handed.

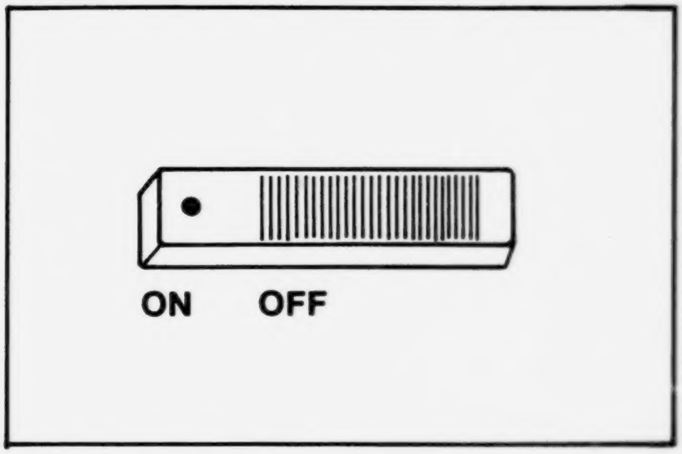


4. Use good posture.

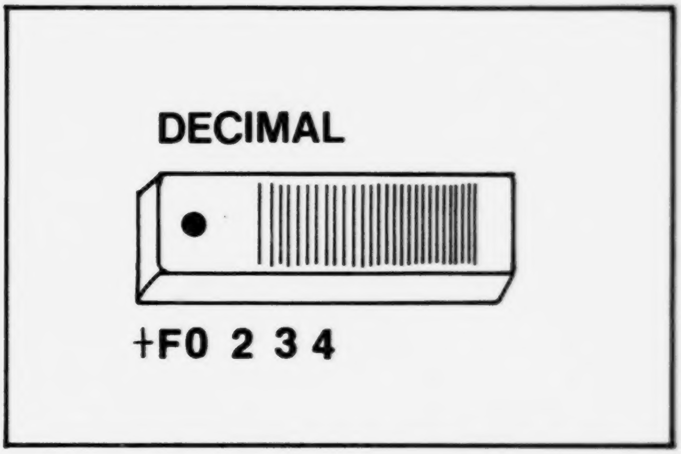
5. Turn on the calculator.



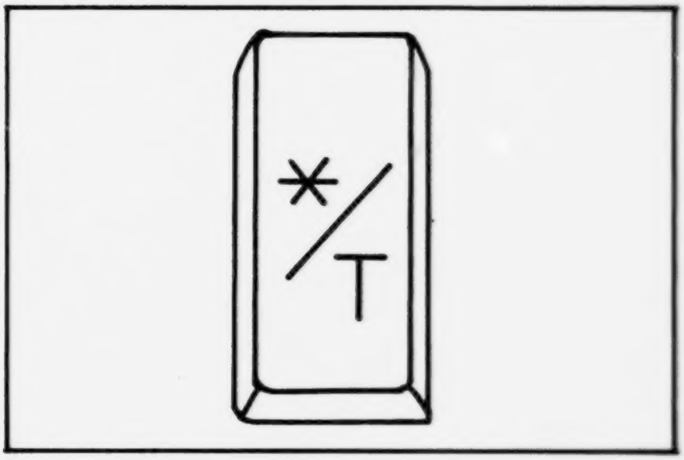
6. Select the printing function.



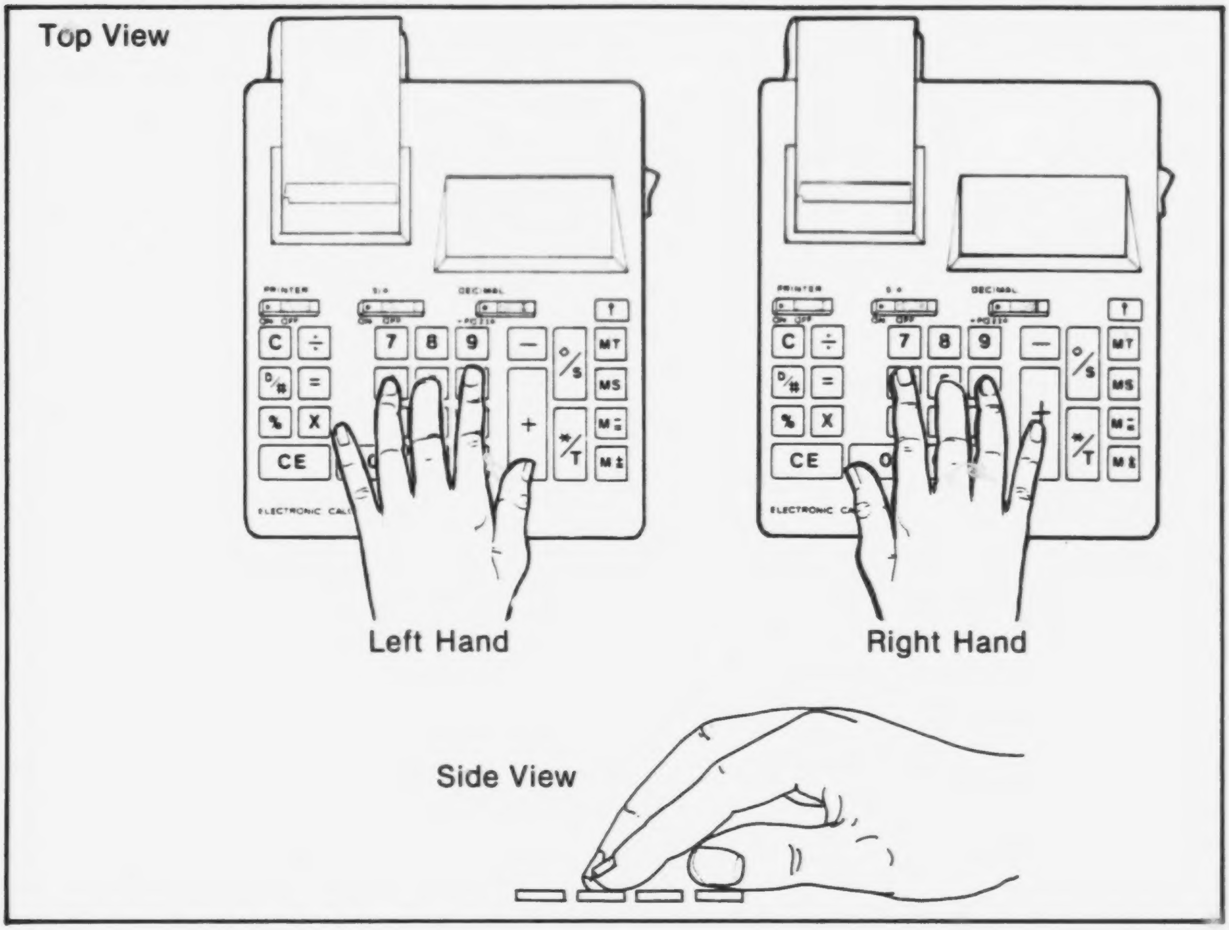
7. Set the decimal selector at 0 for the problems presented here.



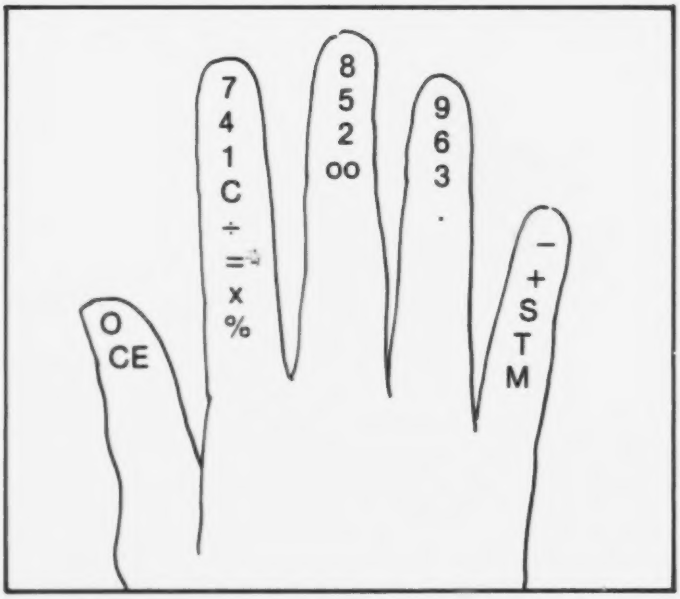
8. Clear the machine by pressing the total key.



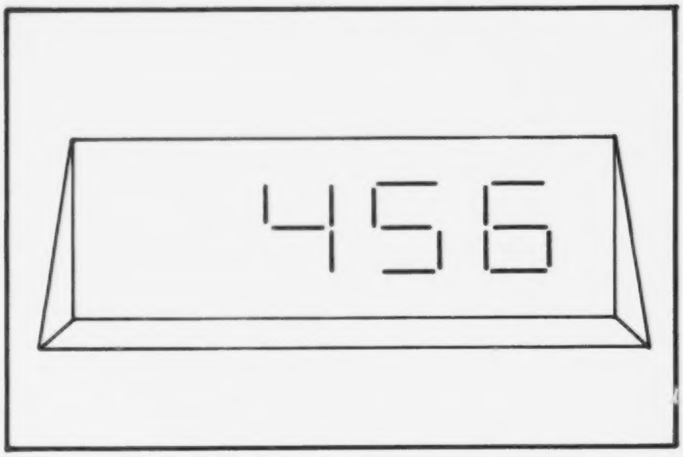
9. Place your first three fingers on the middle row of 4, 5, and 6.



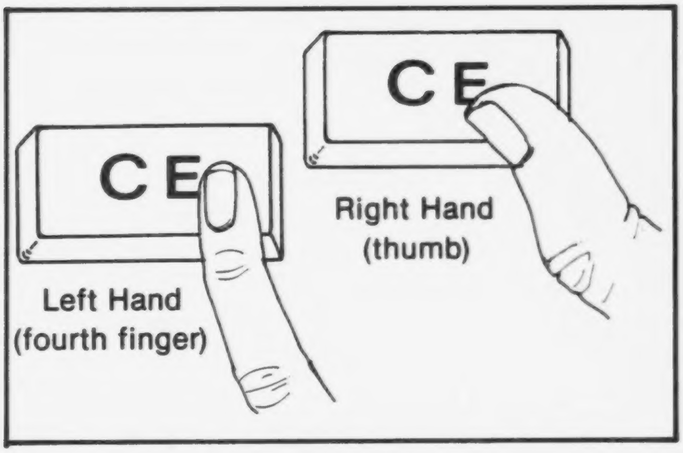
10. If you are right handed, tap the 4 key with the first finger; the 5 key with the second finger; and the 6 key with the third finger.



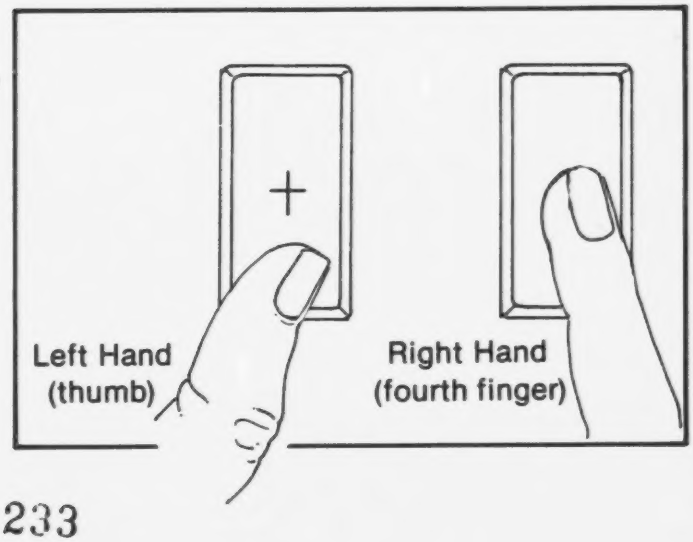
11. The display will show the numbers as you press them.



12. Tap the clear key (CE) if the display shows that you entered an incorrect number. Press the correct number keys.



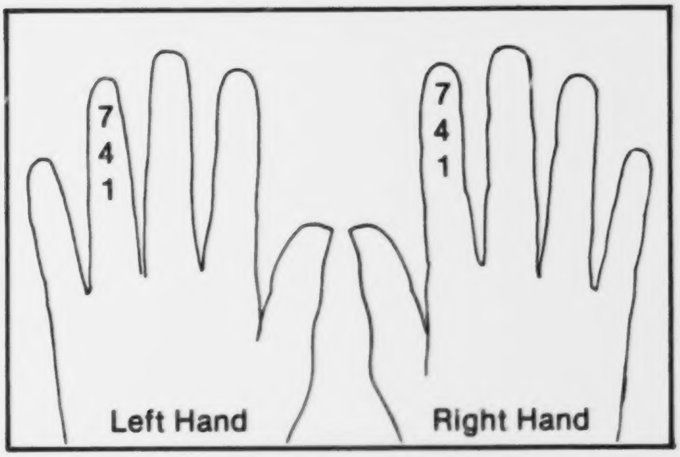
13. Tap the plus key with the thumb if you are left handed; use the fourth finger if you are right handed.



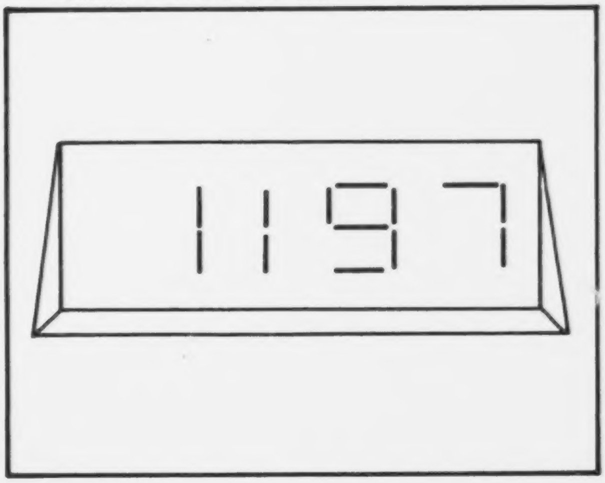
14. Check to see if the paper tape shows the correct entry.

```
   0
456•+
```

15. Tap the 7, 4, and 1 keys.



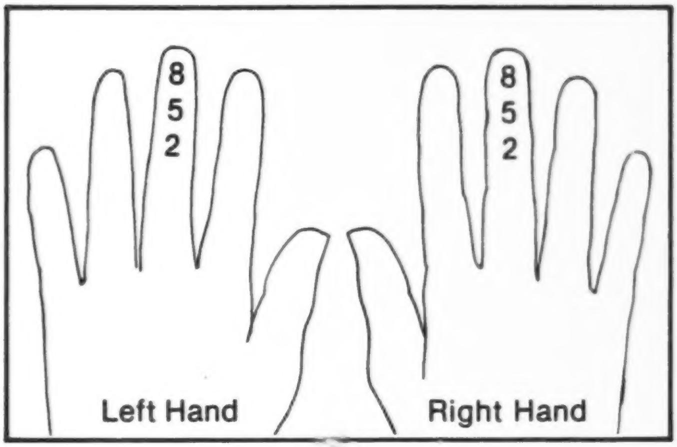
16. Tap the "+" key. The display shows the subtotal.



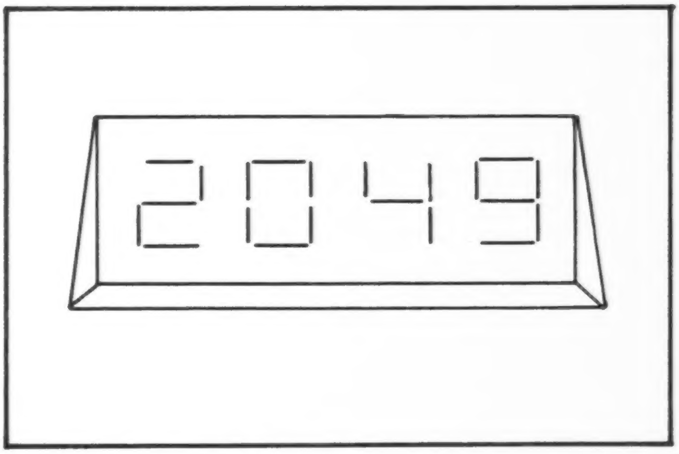
The paper tape shows:

```
    C
4 5 6 • +
7 4 1 • +
```

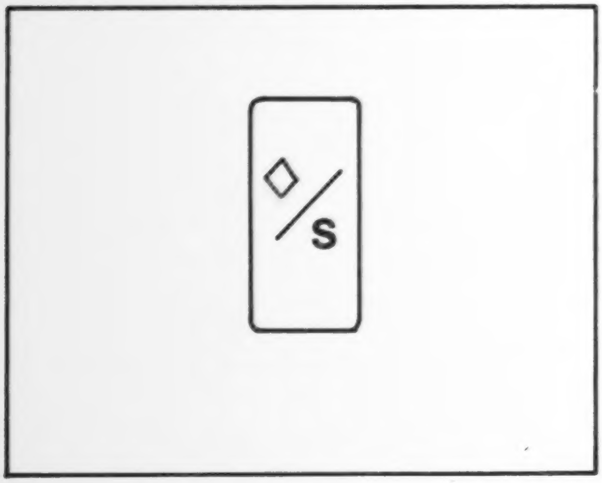
17. Tap the 8, 5, and 2 keys.



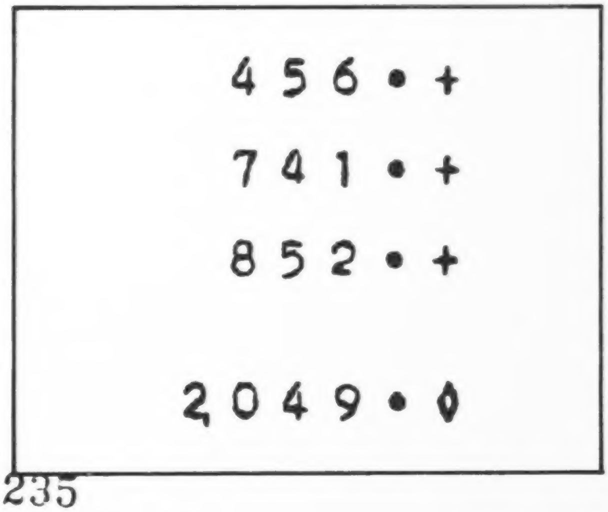
18. Tap the "+" key. The display shows the subtotal.



19. Print subtotals, if instructed, by pressing the subtotal key.



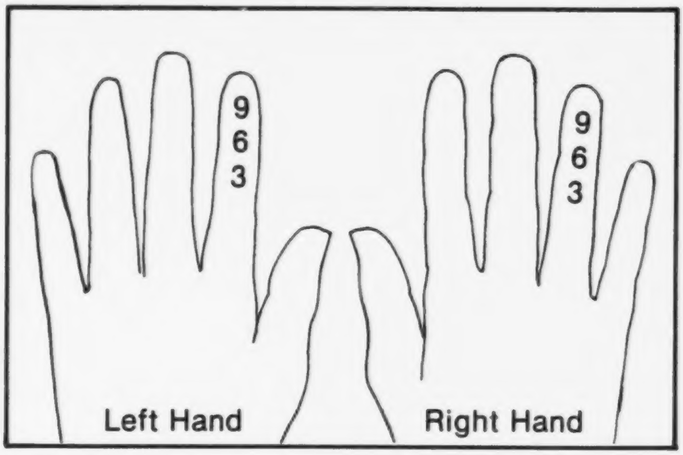
The paper tape shows:



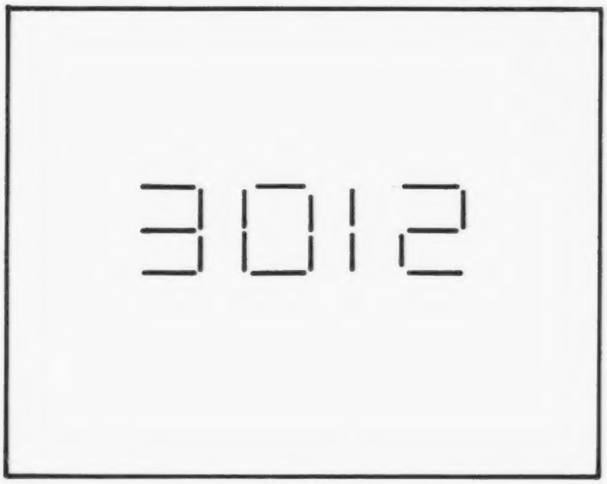
456 • +
741 • +
852 • +

2,049 • ◊

20. Tap the 9, 6, and 3 keys.



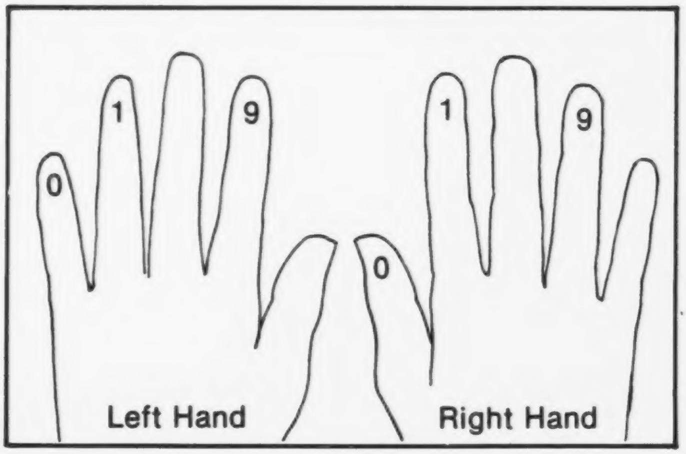
21. Tap the "+" key. The display shows the subtotal as:



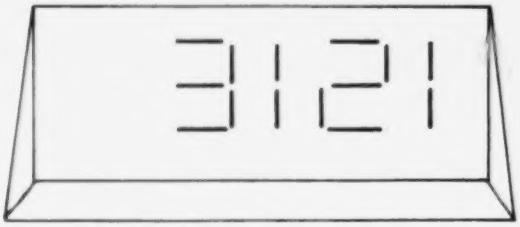
The paper tape shows:

```
  456 • +
  741 • +
  852 • +
2,049 • ◊
  963 • +
```

22. Tap the 1, 0, and 9 keys.



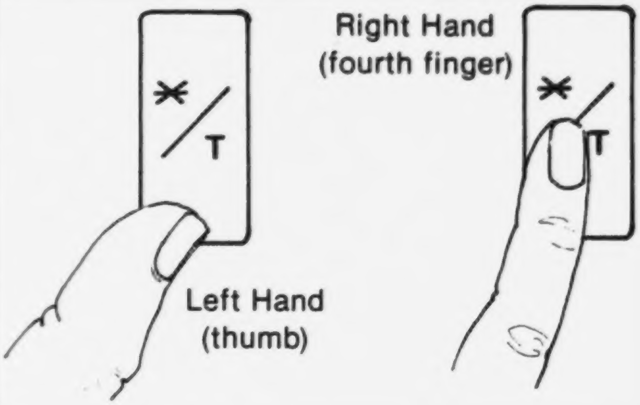
23. Tap the "+" key. The display shows a subtotal of:



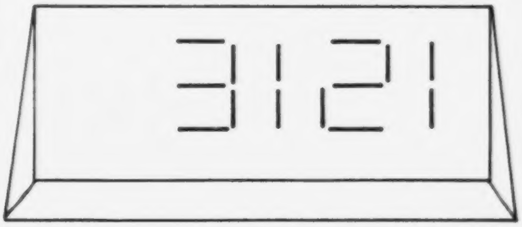
The paper tape shows:

```
  456 • +
  741 • +
  852 • +
2,049 • ◊
  963 • +
  109 • +
```

24. Tap the total key.



25. The display again shows:

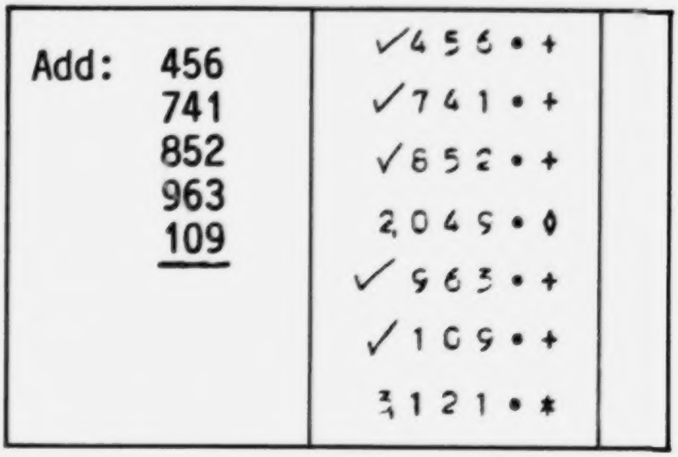


The paper tape shows:

```
  456 • +
  741 • +
  852 • +
2,049 • ◊
  963 • +
  109 • +
3,121 • *
```

26. Compare the paper tape with the assignment to verify whether the correct numbers and function keys were entered.

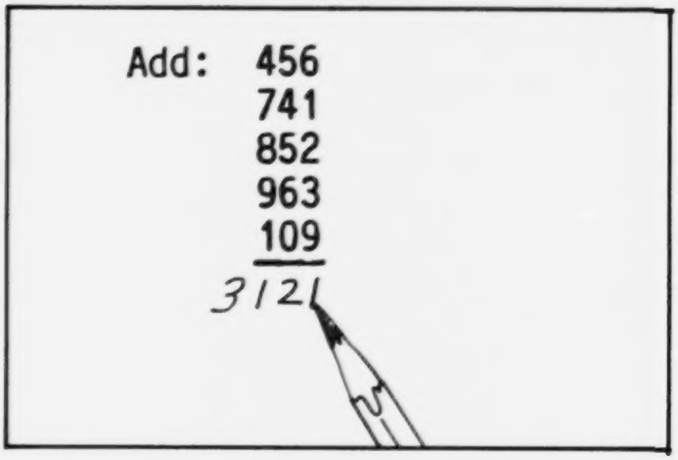
**NOTE:** Place a check mark on the tape as you verify each number.



Add:
456
741
852
963
109

```
✓456 • +
✓741 • +
✓652 • +
2,049 • ◊
✓963 • +
✓109 • +
3,121 • *
```

27. Record the answer.



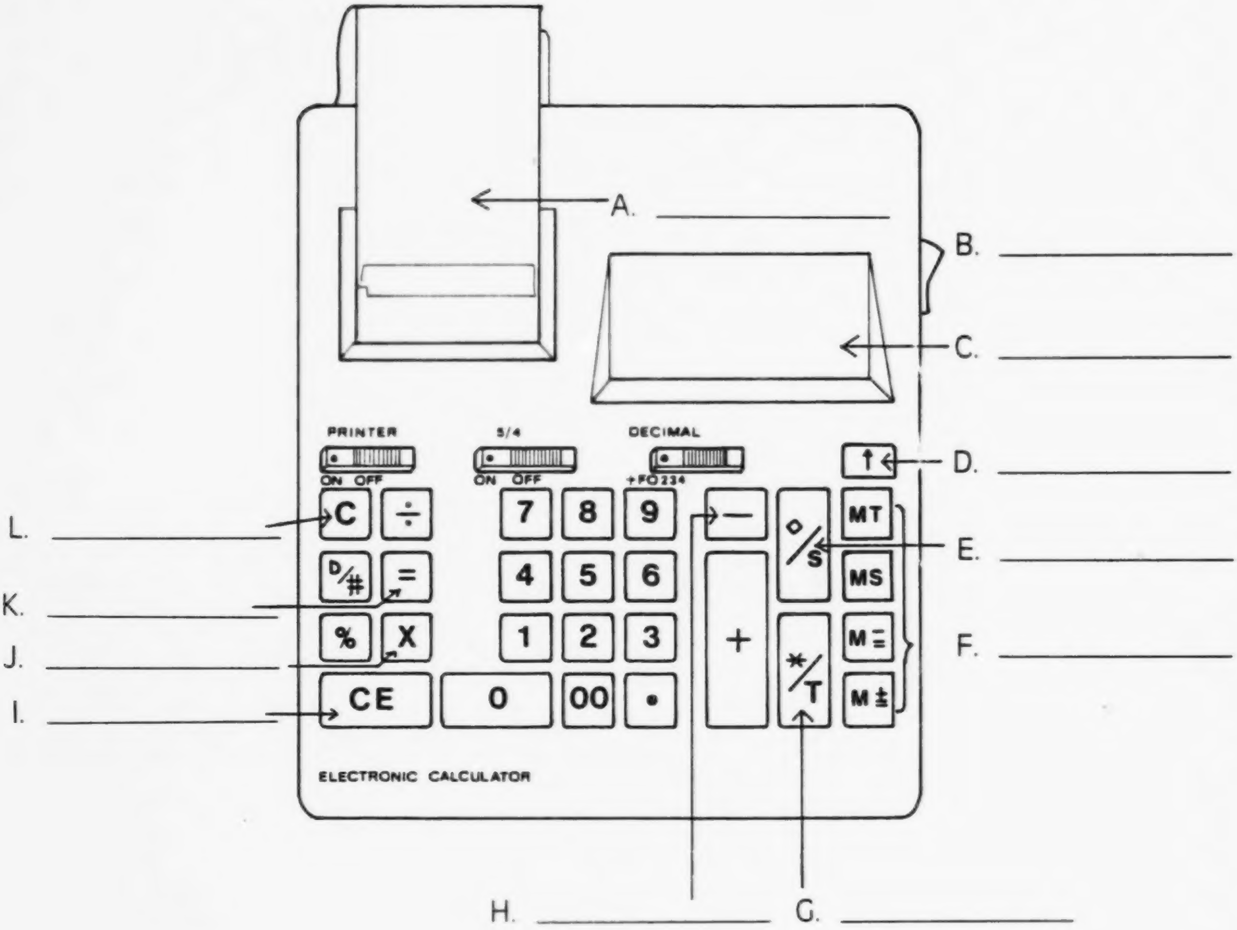
Add:
456
741
852
963
109

3121

## DO SKILL SHEETS 1 AND 2

## Using Basic Business Math
# Skill Sheet 1

**Directions:** Label the parts of the electronic keyboard below. Choose from these terms:
Paper Tape Display On/Off Switch Paper Advance Memory Keys
Minus Total Clear Clear Entry Equals Times Subtotal



# Using Basic Business Math
## Skill Sheet 2

**Directions:** Complete the following exercises by using an electronic calculator.

I. Follow the "Steps for Computing Subtotals (ST) and Totals (T) Featuring Addition" to answer these problems.

| A. | B. | C. | D. |
|---|---|---|---|
| 456 | 987 | 789 | 102 |
| 852 | 951 | 456 | 100 |
| 753 | 963 | 753 | 156 |
| ST | ST | ST | ST |
| 85,200 | 345 | 900 | 555 |
| 4,111 | 300 | 471 | 882 |
| 1,033 | 989 | 915 | 645 |
| T | T | T | T |

II. Move the decimal selector to the "2" setting. Read the following problems and enter the answers in the spaces provided.

a. Five items of office supplies are priced at $6, $3.81, $.72, $12.99, and $3.76 respectively. What is the total cost of these items?

_______________

b. Calculate the amounts shown on the deposit slip and enter the total amount to be deposited.

| | | | |
|---|---|---|---|
| CASH | CURRENCY | 38 | 00 |
| | COIN | 51 | 75 |
| LIST CHECKS SINGLY<br>80-114 | | 15 | 02 |
| 80-119 | | 30 | 17 |
| 228-18 | | 9 | 24 |
| TOTAL FROM OTHER SIDE | | | |
| TOTAL | | | |
| LESS CASH RECEIVED | | | |
| NET DEPOSIT | | | |

[redacted]

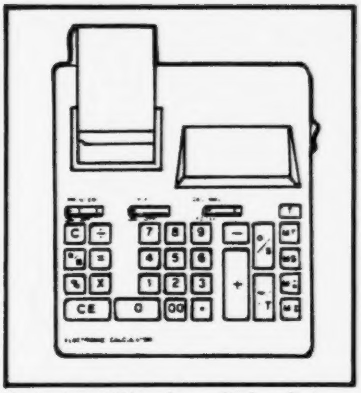
80-105/815

USE OTHER SIDE FOR ADDITIONAL LISTING

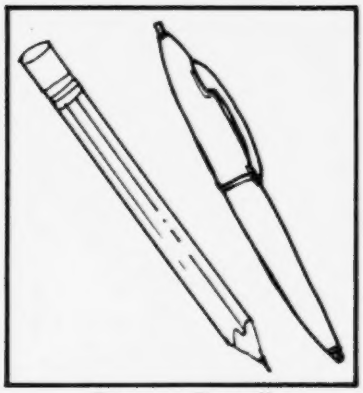
BE SURE EACH ITEM IS PROPERLY ENDORSED

## C. Steps for Computing Subtotals and Totals Featuring Subtraction

1. Clear your work area.
2. Assemble equipment and supplies.



Printer/Display Calculator

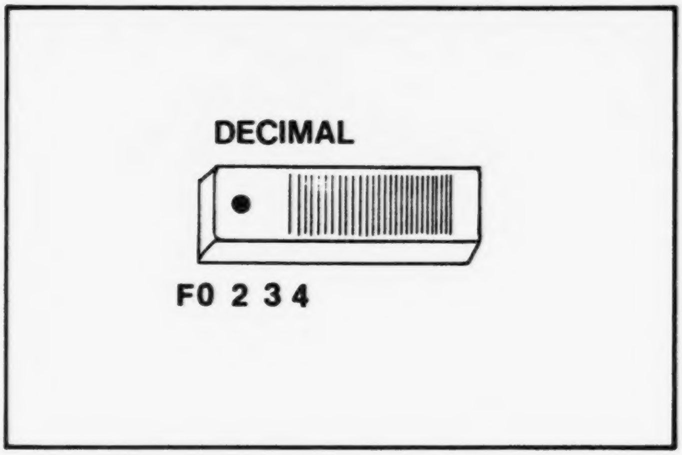


Pen or Pencil

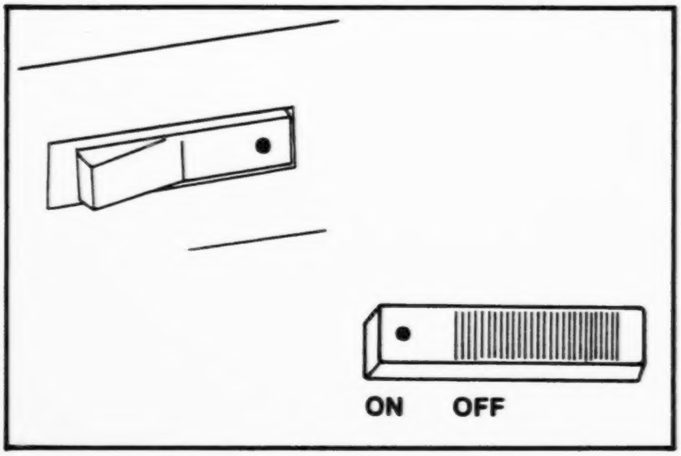
$15.00
- 1.00
- 3.98
- 4.00

Problem

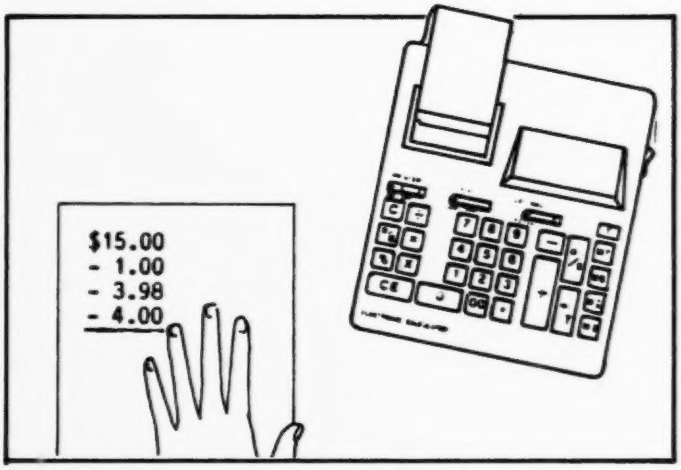
3. Set the decimal selector at 2 for the following problems.



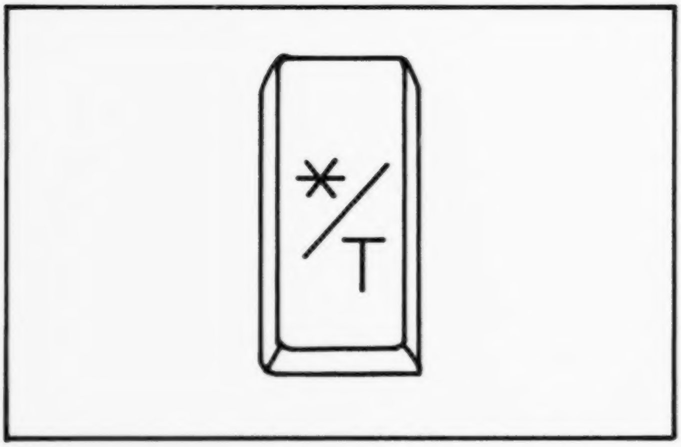
4. Turn on the calculator and select the printing function.



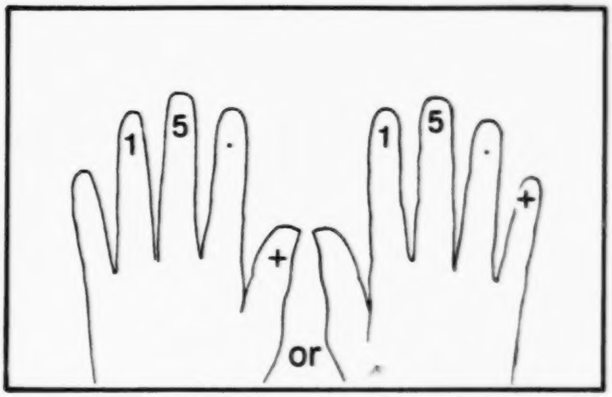
5. Place the assignment to the left of the calculator and turn the calculator slightly to the right if you are right handed.



6. Clear the machine using the total key.



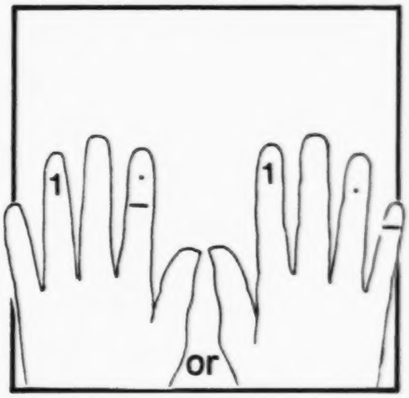
7. Tap these keys: 1, 5, decimal, and plus.



The tape will show:

15•00+

8. Tap these keys: 1, decimal, and minus.



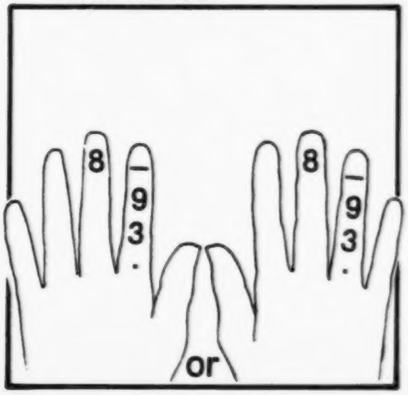
The tape will show:

15•00+
1•00–

The display shows a subtotal of:

14.00

9. Tap these keys: 3, decimal, 9, 8, and minus.



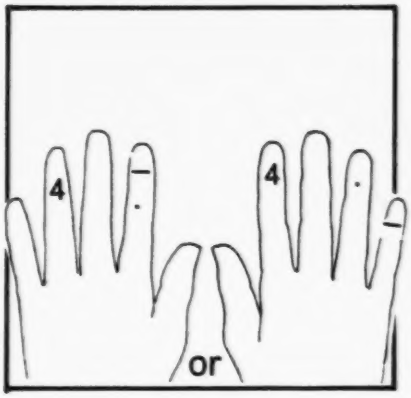
The tape will show:

15•00+
1•00–
3•98–

The display shows a subtotal of:

10.02

10. Tap these keys: 4, decimal, and minus.



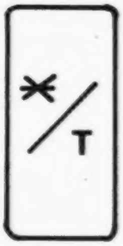
The tape will show:

15•00+
1•00–
3•98–
4•00–

The display shows a subtotal of:

6.02

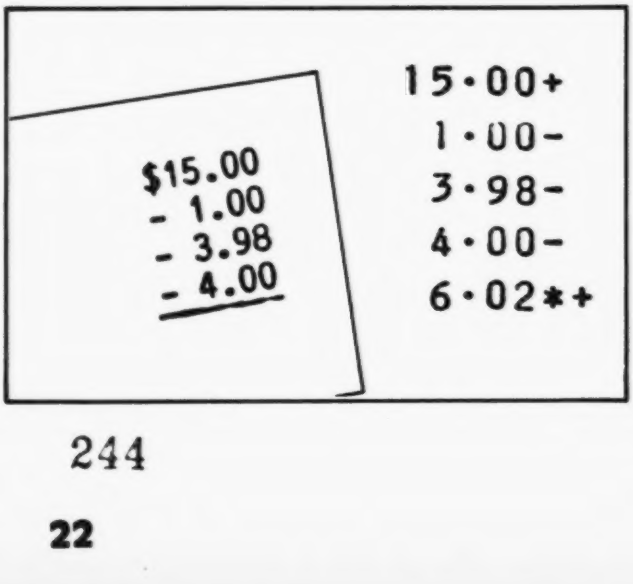
11. Tap the total key.



The tape shows:

15•00+
1•00–
3•98–
4•00–
6•02*+

12. Compare the tape with the assignment to determine whether the correct numbers and functions were entered. Record the answer on the assignment sheet.



$15.00
- 1.00
- 3.98
- 4.00

15•00+
1•00–
3•98–
4•00–
6•02*+

**DO SKILL SHEET 3**

## Using Basic Business Math

# Skill Sheet 3

**Directions:** Complete the following exercises by using an electronic calculator.

I. Follow the "Steps for Subtotals and Totals Featuring Subtraction" to compute the answers to these problems.

| A. | B. | C. | D. | E. |
|---|---|---|---|---|
| 1,331.16 | 868.35 | 720.01 | 99.23 | 568.19 |
| —127.22 | —11.42 | —30.00 | —4.25 | —34.86 |
| —158.00 | —20.00 | —20.00 | —30.00 | —2.55 |
| —123.36 | —9.63 | —30.17 | —15.71 | —27.35 |
| | | | | |

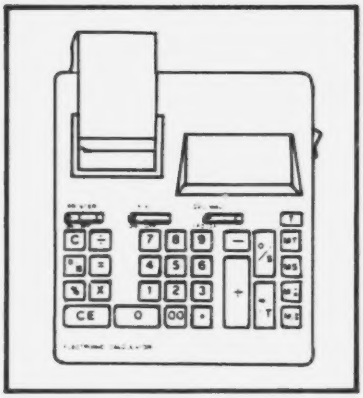
II. Addition and Subtraction. Use the plus function key when entering the balance brought forward and the amount deposited. Use the minus function key to subtract the amount of the check.

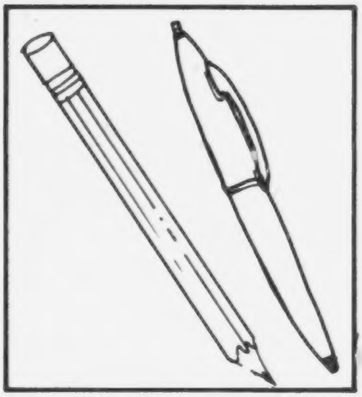
| | A. | B. | C. |
|---|---|---|---|
| Balance Brought Forward | 51.34 | 540.50 | 979.00 |
| Amount Deposited | 1,704.31 | 500.00 | 225.00 |
| | ST | ST | ST |
| Amount This Check | 447.66 | 87.53 | 46.30 |
| Balance Carried Forward: | | | |

| | D. |
|---|---|
| Balance Brought Forward | 616.23 |
| Amount Deposited | 2,380.65 |
| | ST |
| Amount This Check | 38.27 |
| Balance Carried Forward: | |

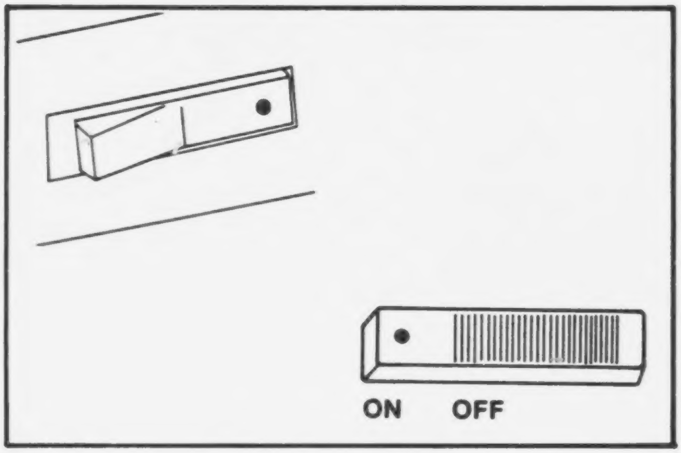
## D. Steps for Computing Subtotals and Totals Featuring Multiplication

1. Clear work area.
2. Assemble equipment and supplies.

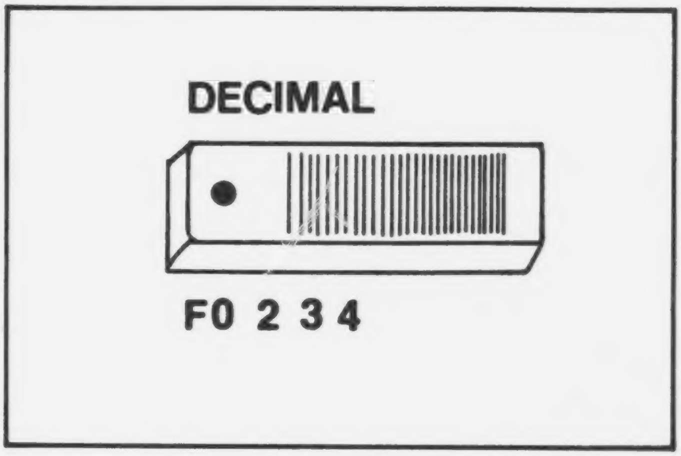




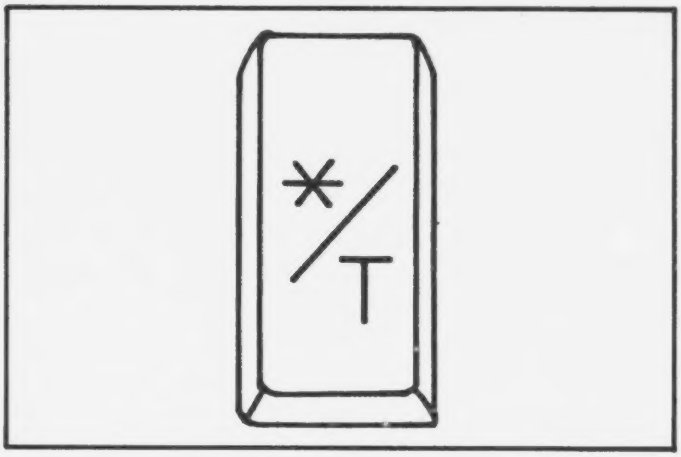
3. Turn on the calculator and select the printing function.



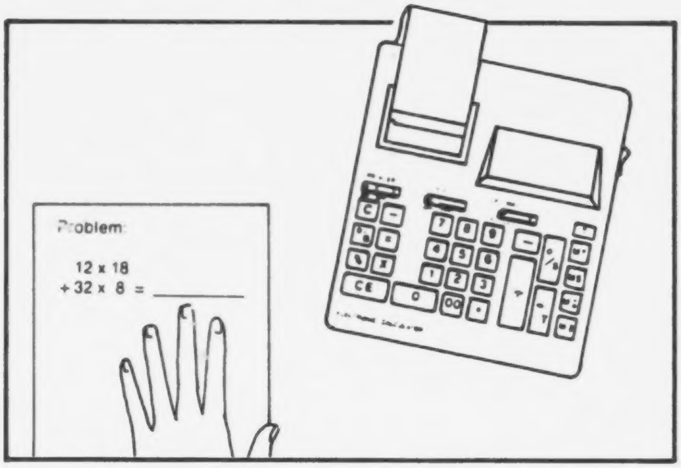
4. Move the decimal selector to the 0 setting for the following problem.



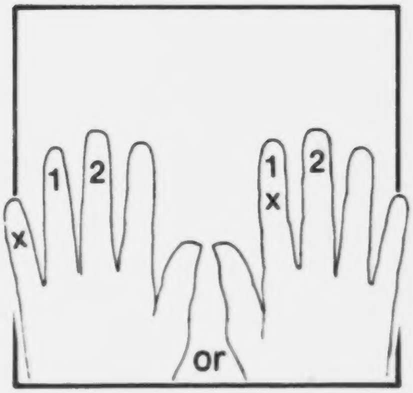
5. Clear the machine using the total key.



6. Place the assignment to the left of the calculator if you are right handed.



7. Tap the 1 and 2 keys and the multiplication (times) key.



The display shows:

12.00

The tape shows:

0

12 • x

8. Tap the 1 and 8 keys and the M±.

The tape shows:

12 • x

18 • ±

The subtotal is:

12 • x

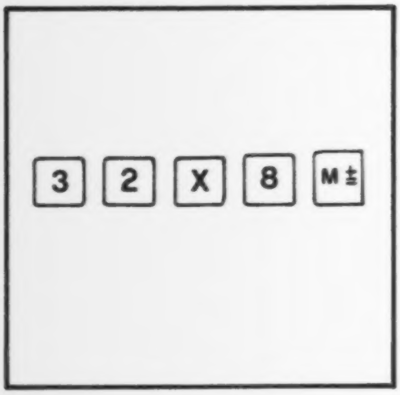
18 • ±

216 • M+

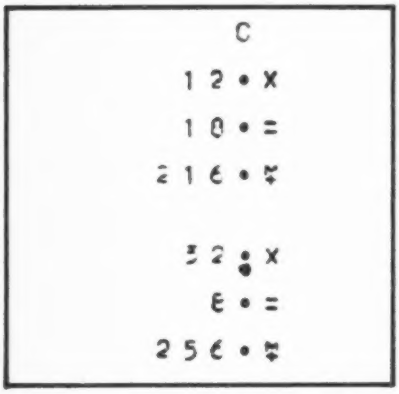
The display shows:

M 216.

9. Tap these keys individually.

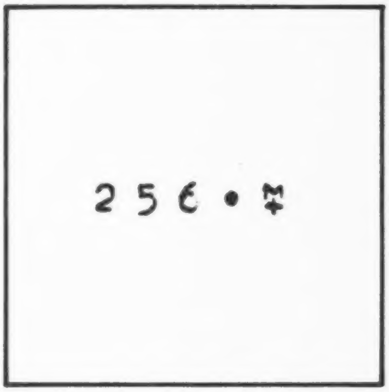


The tape shows:



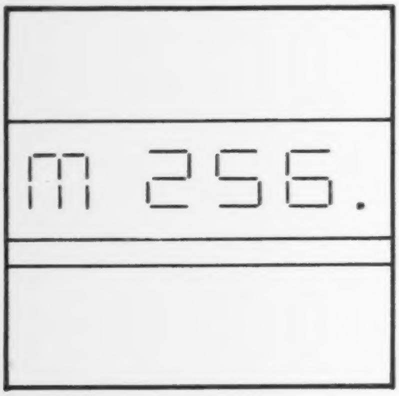
```
      C
  1 2 • X
  1 8 • =
2 1 6 • M+

  3 2 • X
    8 • =
2 5 6 • M+
```

The new subtotal is:

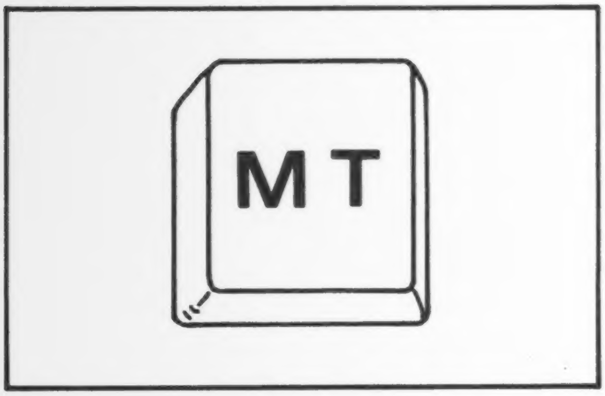


2 5 6 • M+

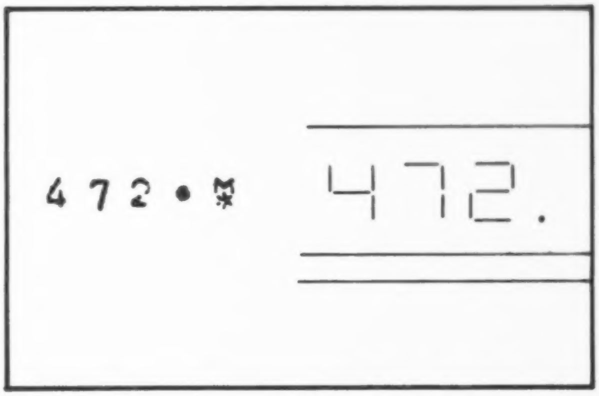
The display shows:



10. Tap the memory total key.



Both the tape and display show a total of:



4 7 2 • M+

**DO SKILL SHEET 4**

# Using Basic Business Math
# Skill Sheet 4

**Directions:** Follow the "Steps for Computing Subtotals and Totals Featuring Multiplication" to compute the answers to these problems. Multiply the amount in the "Quantity" column times the "Unit Price." The subtotals should be entered in the column marked "Extension." Enter the Memory Total in the area marked "Invoice Total."

A.

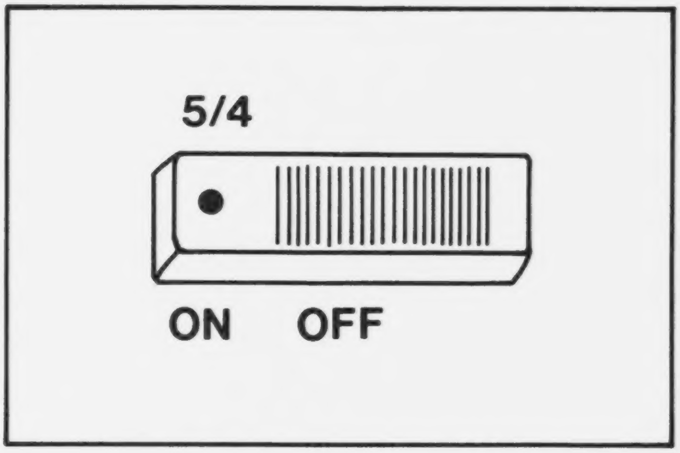
| Quantity | Catalog No. | Description | Unit Price | Extension |
|---|---|---|---|---|
| 1 | 3 B 59301 | Integrt'd Phone System | 169.99 | |
| 12 | 3 B 5984 | Outgoing Tape | 4.99 | |
| 6 | 3 B 5981 | Incoming Tape | 4.99 | |
| | | | Invoice Total | |

B.

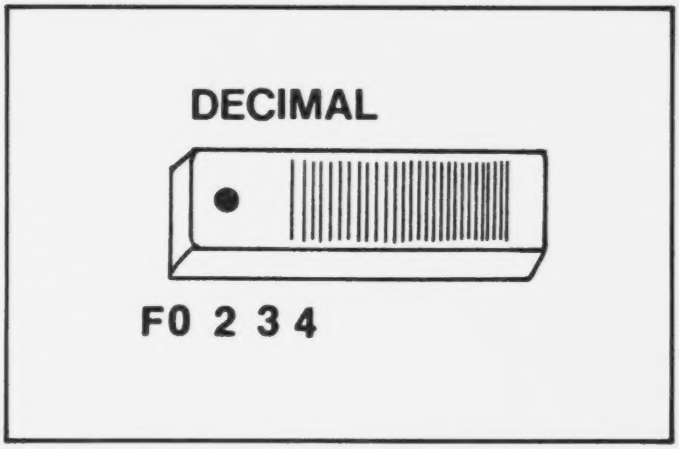
| Quantity | Catalog No. | Description | Unit Price | Extension |
|---|---|---|---|---|
| 3 | 9 B 83633 | Surge Suppressor | 39.99 | |
| 2 | 9 B 83193 | Security Switch | 24.99 | |
| 2 | 9 B 83194 | Wall Outlet Sensor Timer | 12.99 | |
| | | | Invoice Total | |

## E. Steps for Calculating Percentages

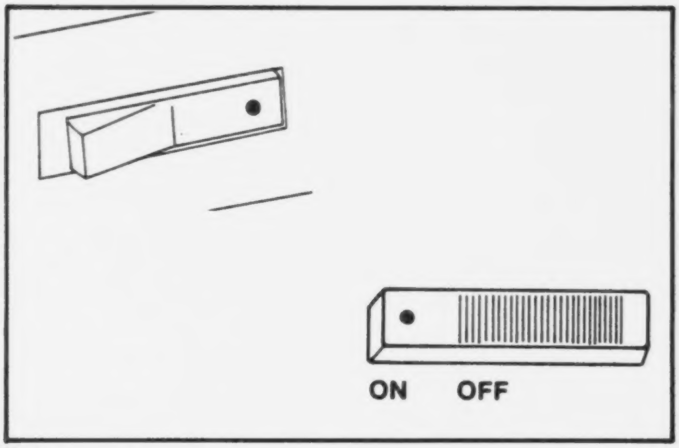
1. Move the 5/4 button to **On** if the instructions indicate for the answers to the problems to be rounded up.



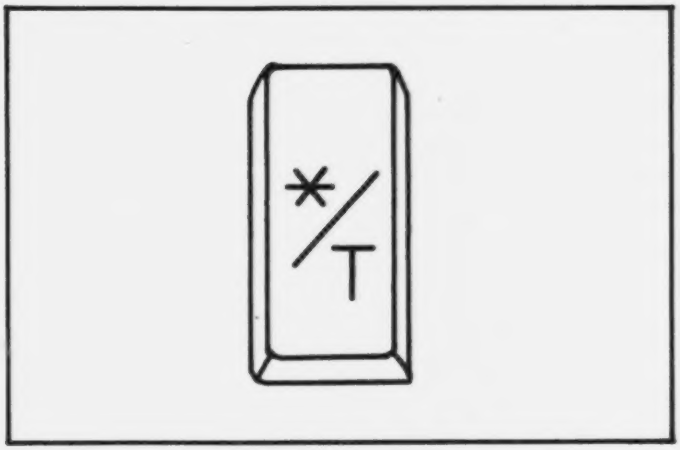
2. Move the decimal selector to the 2 setting if the answer is to be rounded up to 2 decimal places.



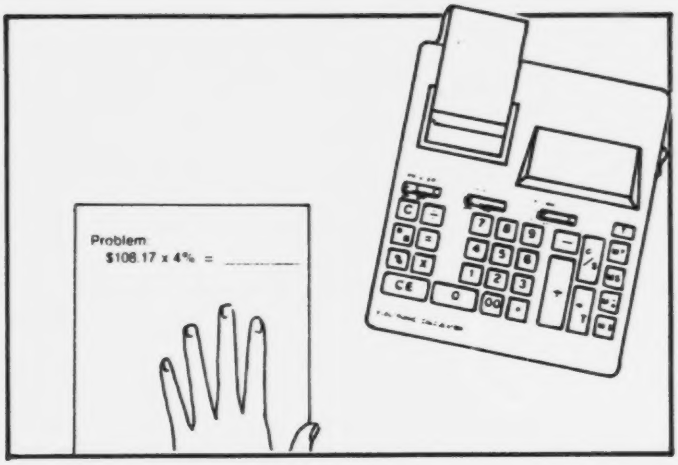
3. Turn on the calculator and select the printing function.



4. Press the total key to clear the machine.



5. Place the assignment to the left of the calculator and turn the calculator slightly to the right if you are right handed.



6. Tap these keys individually:
108.17 x 4%

108.17 x 4%

7. Compare your tape with the following:

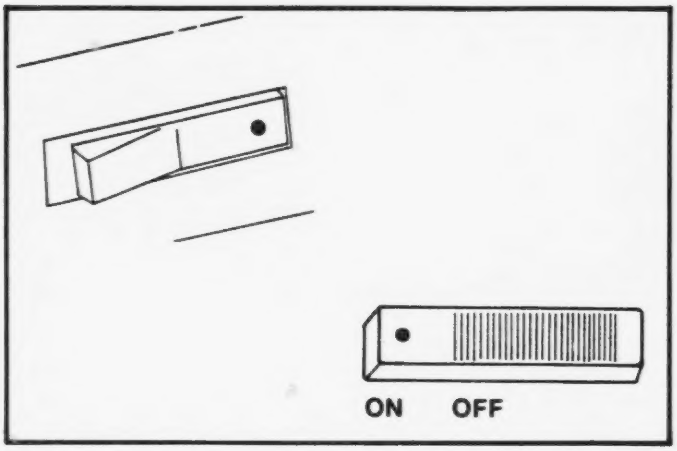
```
       C
108•17X
   4•00%
   4•33*
```

8. Record the answer.

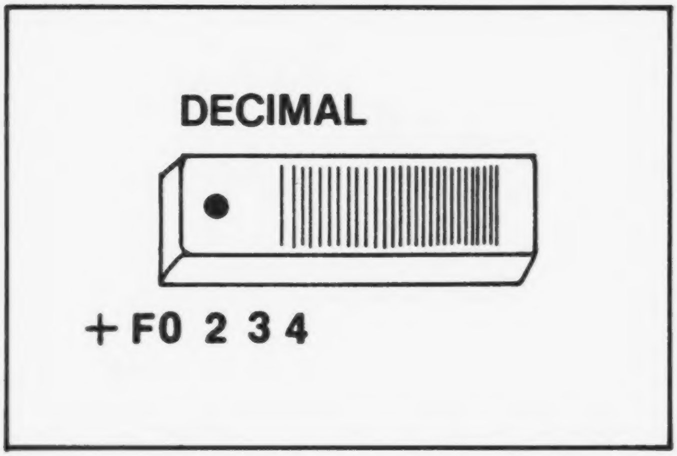
$108.17 X 4% = $4.33

## F. Steps for Calculating Discounts

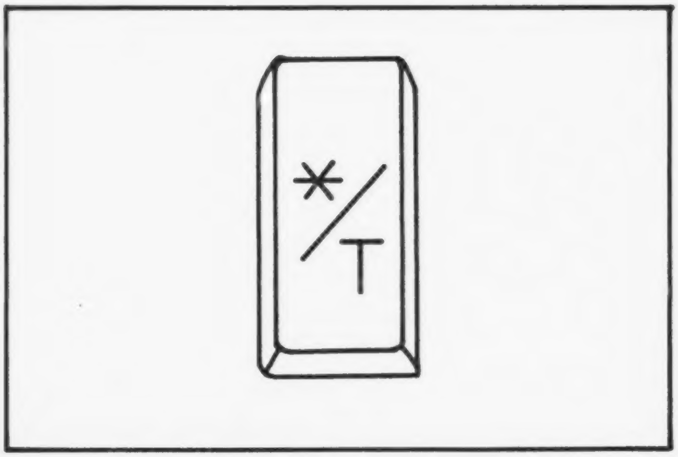
1. Turn on the calculator and select the printing function.



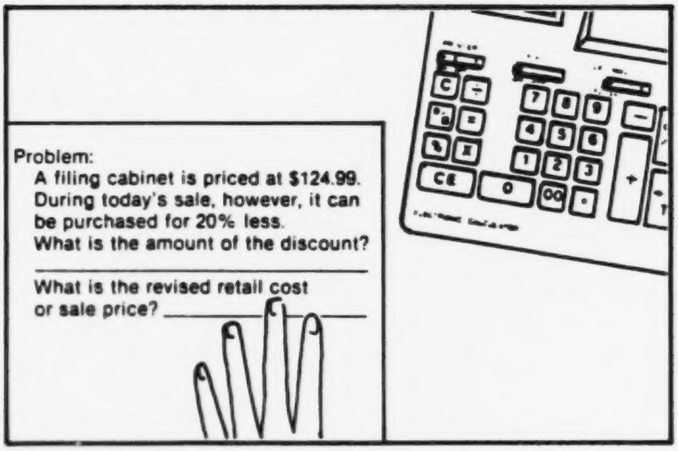
2. Move the decimal selector to the 2 setting.



3. Press the total key to clear the machine.



4. Place the assignment to the left of the calculator.



Problem:
A filing cabinet is priced at $124.99. During today's sale, however, it can be purchased for 20% less.
What is the amount of the discount? ____________

What is the revised retail cost or sale price? ____________

5. Tap these keys individually: 124.99 x 20%

124.99 x 20%

6. Compare your tape with the example shown here.

```
         C
1 2 4 • 9 9 X
  2 0 • 0 0 %
  2 5 • 0 0 *
```

7. The amount of the discount is $25.00. Subtract the discount from the original price of $124.99.

```
           0
   1 2 4 • 9 9 X
—    2 5 • 0 0 *

     9 9 • 9 9 *
```

8. The sale price is $99.99.

```
           0
   1 2 4 • 9 9 X
     2 0 • 0 0 %
     2 5 • 0 0 *

     9 9 • 9 9 *
```

## DO SKILL SHEET 5

# Using Basic Business Math
# Skill Sheet 5

**Directions:** Complete the following charge slips by adding the charges. Subtract any discounts. Then, multiply the subtotal by 6 percent, the combined tax rate for the city and state.

b159371

CARROLL'S FLORIST
9250008100
SIKESTON, IL

| QUAN | DESCRIPTION | SIZE | UNIT COST | AMOUNT |
|---|---|---|---|---|
| | | | | |
| 2 | Dozen Roses | | 36.00 | |
| 1 | Large Vase | | | 5 15 |
| | | | | |

| | | | | |
|---|---|---|---|---|
| IDENTIFICATION | DATE | AUTH CODE | SUB TOTAL | |
| DEPARTMENT | SALES CLERK | TYPE SALE | TAX | |
| SALES SLIP | CURRENCY CONVERSION<br>DATE RATE AMOUNT | | TOTAL | |

SALE CONFIRMED TERMS ON REVERSE SIDE ACCEPTED
X
CUSTOMER SIGNATURE

CUSTOMER COPY

RETAIN THIS COPY FOR STATEMENT VERIFICATION

b159372

CARROLL'S FLORIST
9250008100
SIKESTON, IL

| QUAN | DESCRIPTION | SIZE | UNIT COST | AMOUNT |
|---|---|---|---|---|
| | | | | |
| 1 | Spring Arrangement | | | 15 00 |
| 1 | Oak Tree | | | 20 50 |
| | 15% Discount | | | |

| | | | | |
|---|---|---|---|---|
| IDENTIFICATION | DATE | AUTH CODE | SUB TOTAL | |
| DEPARTMENT | SALES CLERK | TYPE SALE | TAX | |
| SALES SLIP | CURRENCY CONVERSION<br>DATE RATE AMOUNT | | TOTAL | |

SALE CONFIRMED TERMS ON REVERSE SIDE ACCEPTED
X
CUSTOMER SIGNATURE

CUSTOMER COPY

RETAIN THIS COPY FOR STATEMENT VERIFICATION

## Using Basic Business Math
# Unit Review

**Directions:** Use an electronic calculator to solve the following problems.

| | | | | |
|---|---|---|---|---|
| 1. | Add: | 789<br>741<br>753 | 555<br>777<br>747 | 123<br>456<br>987 |
| | Subtotal: | ________ | ________ | ________ |
| | Add: | 252 | 996 | 410 |
| | Total: | ________ | ________ | ________ |
| 2. | | 235<br>–103 | 787<br>–417 | 1.001.00<br>–951.45 |
| | Subtotal: | ________ | ________ | ________ |
| | Subtract: | –14 | –166 | –5.67 |
| | Total: | ________ | ________ | ________ |

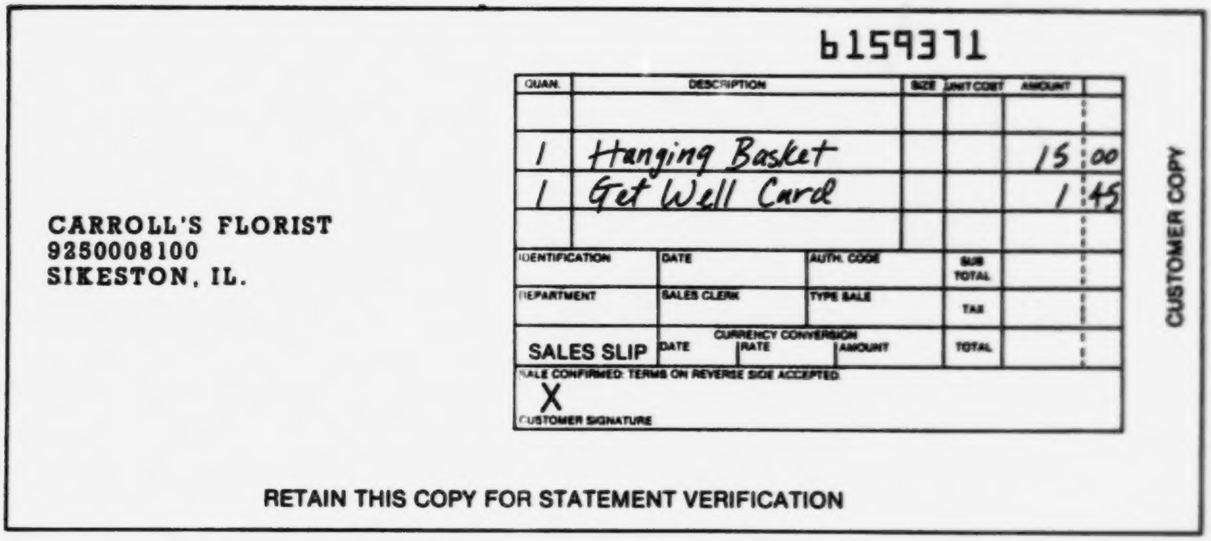
3. 12 x 3.99
   20 x 5.99 ________

4. $108.98 x 30% ________
   $239.98 x 20% ________

5. An item costing $27.98 is on sale for 30% less. What is the sale price?

________________________________

6. Determine the "Total" of the following charge slip. The tax rate for this city is 7 percent.



6159371

**CARROLL'S FLORIST**
**9250008100**
**SIKESTON, IL.**

| QUAN. | DESCRIPTION | SIZE | UNIT COST | AMOUNT |
|---|---|---|---|---|
| | | | | |
| 1 | Hanging Basket | | | 15.00 |
| 1 | Get Well Card | | | 1.45 |
| | | | | |

| | | | | |
|---|---|---|---|---|
| IDENTIFICATION | DATE | AUTH. CODE | SUB TOTAL | |
| DEPARTMENT | SALES CLERK | TYPE SALE | TAX | |
| SALES SLIP | CURRENCY CONVERSION<br>DATE RATE AMOUNT | | TOTAL | |

SALE CONFIRMED: TERMS ON REVERSE SIDE ACCEPTED

X

CUSTOMER SIGNATURE

CUSTOMER COPY

RETAIN THIS COPY FOR STATEMENT VERIFICATION

## Using Basic Business Math
# Performance Checklist

Student ______________________ has successfully performed the following steps of procedure.

| Using the Electronic Calculator | Yes | No | Comments |
|---|---|---|---|
| 1. Identified these functional keys: | | | |
| clear | | | |
| equals | | | |
| times | | | |
| percent | | | |
| minus | | | |
| plus | | | |
| subtotal | | | |
| total | | | |
| memory total | | | |
| memory plus | | | |
| paper advance | | | |
| clear entry | | | |
| 5/4 | | | |
| decimal selector | | | |
| 2. Used good posture | | | |
| 3. Completed addition steps: | | | |
| tapped clear key | | | |
| tapped entries and function key | | | |
| tapped total key | | | |
| compared tape to problem | | | |
| 4. Completed subtraction steps: | | | |
| tapped clear key | | | |
| tapped entries and function key | | | |
| tapped total key | | | |
| compared tape to problem | | | |
| 5. Completed multiplication steps: | | | |
| tapped clear key | | | |
| tapped numbers and function key of | | | |
| X | | | |
| = or M+(if needed) | | | |
| MT (if needed | | | |
| compared tape to problem | | | |
| 6. Completed percentage steps: | | | |
| tapped clear key | | | |
| tapped number and function keys of: | | | |
| X | | | |
| % | | | |
| compared tape to problem | | | |
| 7. Completed discount steps: | | | |
| tapped clear key | | | |
| tapped numbers and function keys of: | | | |
| X | | | |
| % | | | |
| — | | | |
| compared tape to problem | | | |

Satisfactory - Should Move On ☐
Repeat This Unit ☐

______________________ Student Signature/Date

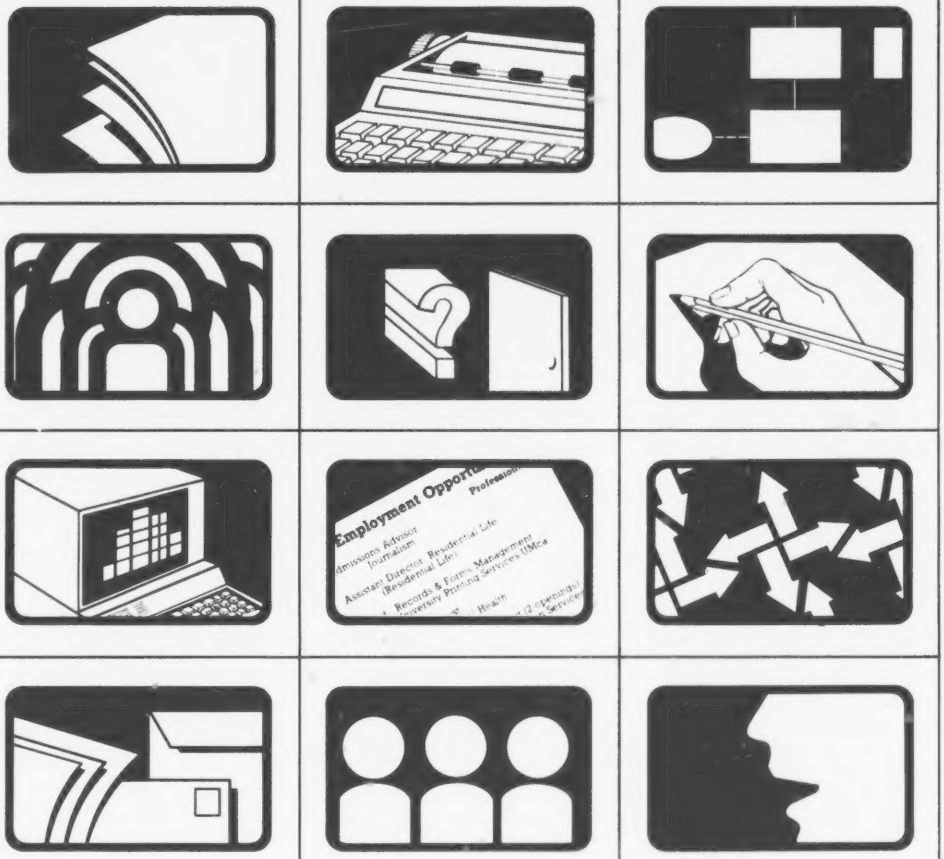
______________________ Instructor Signature/Date

SN-92-S

# SUPPLEMENTARY UNITS FOR SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

# Banking

## Unit 7



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FUNDED BY
DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION • JEFFERSON CITY, MO 65102

## Banking
# Introduction

Knowing banking procedures is an important responsibility in an organization. Demonstrating the ability to carry out these activities can lead to increased prestige and continued professional growth for the office worker.

This unit shows you supplies, equipment, and procedures for preparing checks, petty cash vouchers, and deposit slips plus techniques for reconciling bank statements.

## Unit Objective

After completion of this unit, you should be able to perform several banking activities.

## Specific Objectives

After completion of this unit, you should be able to:

1. Use a tickler file to organize payments.
2. Prepare check stubs.
3. Write checks.
4. Prepare petty cash vouchers.
5. Complete deposit slips.
6. Reconcile bank statements.

---

## Are You Ready?

Check the statement which is true for you.

☐ I want to study the information in this unit before doing the Performance Checklist.

**TURN TO NEXT PAGE AND BEGIN**

☐ I can do the above tasks and I am ready to do the Performance Checklist.

**SEE YOUR INSTRUCTOR**

## A. Terms and Equipment Needed for Banking Activities

### Terms

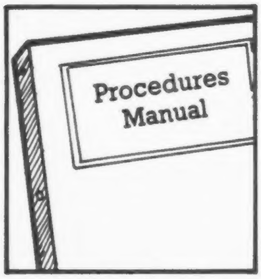
1. Cancelled check - a check that has been processed by the bank (this shows that the bank has deducted the amount from the account of the firm or person and has enclosed the check with the customer's bank statement.)
2. Creditor - a firm or person to whom money is owed
3. Payee - the name of the firm or person to whom a check or voucher is written
4. Procedures manual - a company notebook designed to supply information about office tasks
5. Tickler file - a filing system based on calendar dates to remind employees to prepare or carry out activities

### Equipment and Supplies

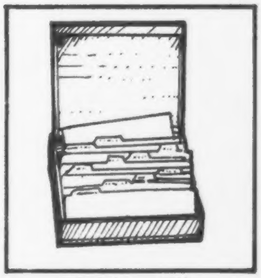
Check Stub

Calculator

Return Envelope

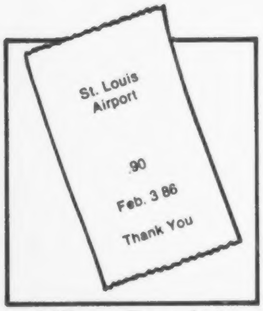


Procedures Manual

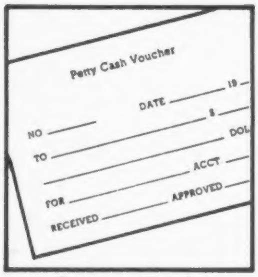


Tickler File

Desk Calendar



Bill or Receipt



Petty Cash Voucher

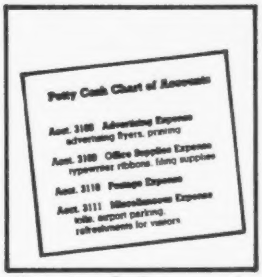

Petty Cash Chart of Accounts

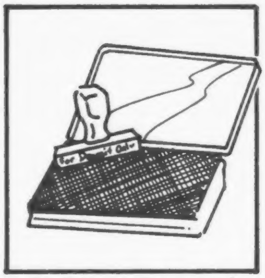
Chart of Accounts

Petty Cash Box

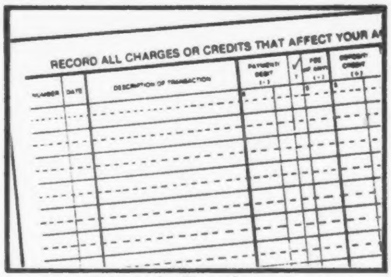
Currency

Coins

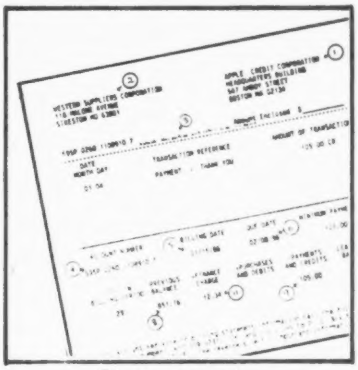
Deposit Slip



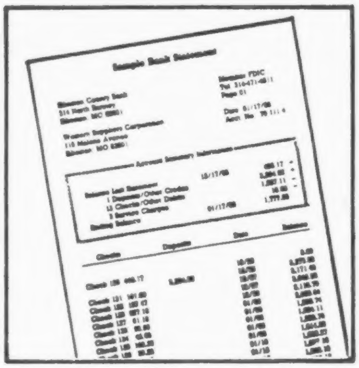
Rubber Stamp/
Ink Pad


RECORD ALL CHARGES OR CREDITS THAT AFFECT YOUR A

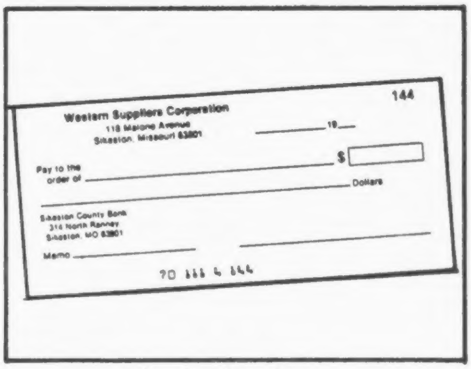
Check Register



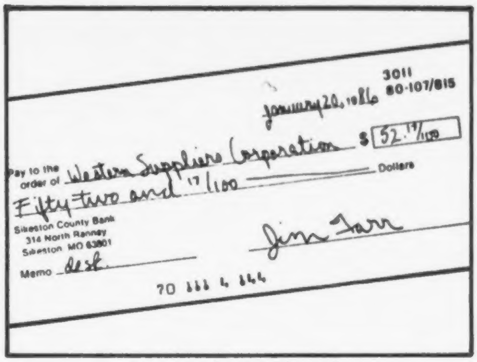
Statement



Bank Statement



Blank Checks



3011
80-107/815

January 20, 1986

Pay to the order of Western Suppliers Corporation $ 52.17/100

Fifty-two and 17/100 Dollars

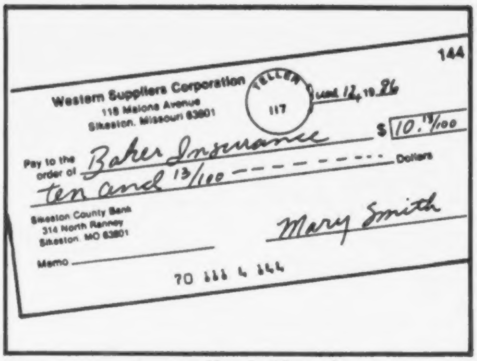
Sikeston County Bank
314 North Ranney
Sikeston MO 63801

Memo desk

Jim Farr

70 111 4 144

Incoming Check



144

Western Suppliers Corporation
118 Malone Avenue
Sikeston, Missouri 63801

TELLER
117

June 12, 19 86

Pay to the order of Baker Insurance $ 10.13/100

ten and 13/100 Dollars

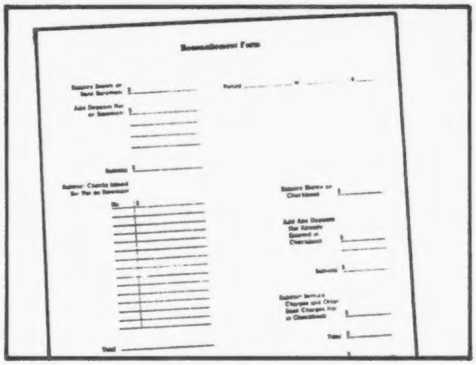
Sikeston County Bank
314 North Ranney
Sikeston MO 63801

Memo

Mary Smith

70 111 4 144

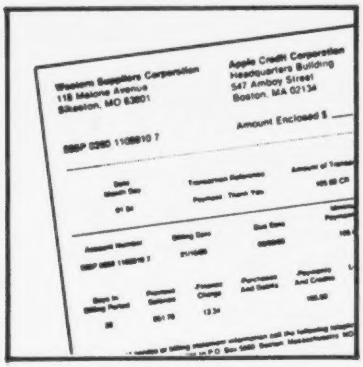
Cancelled Check



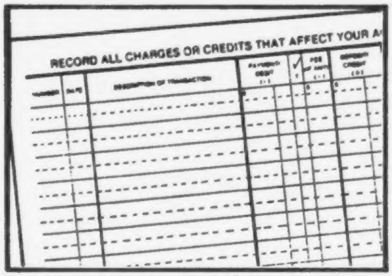
Reconcilement Form

## B. Steps for Organizing Payments

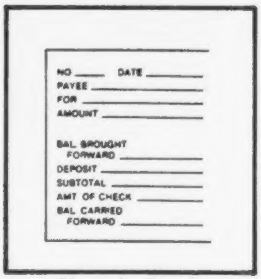
1. Clear your work area.
2. Assemble equipment.



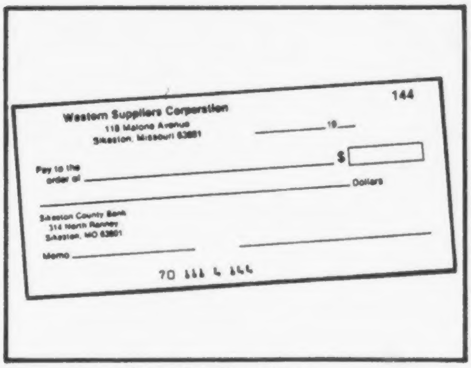
Statement


RECORD ALL CHARGES OR CREDITS THAT AFFECT YOUR A

Check Register

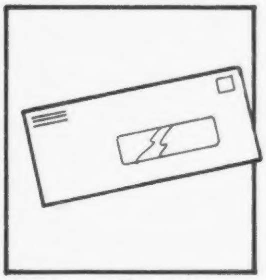


Check Stub

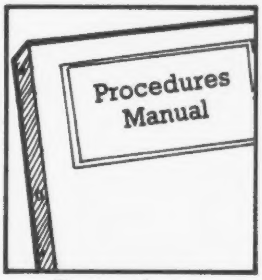


Blank Checks

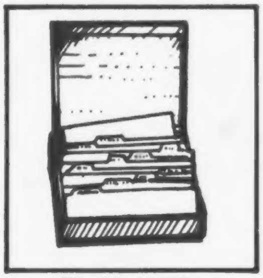
Calculator



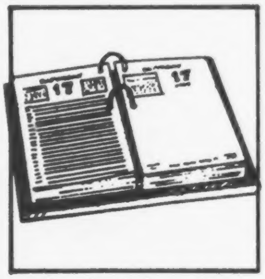
Return Envelope



Procedures
Manual



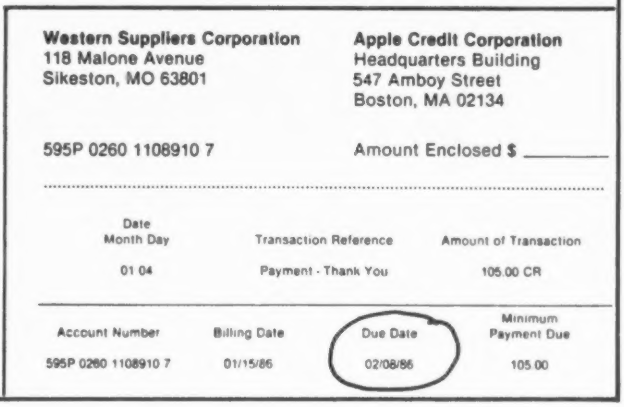
Tickler File



Desk Calendar

3. Open the incoming bill and remove the contents which are a statement and the return envelope.

4. Determine due date.



**Western Suppliers Corporation**
118 Malone Avenue
Sikeston, MO 63801

**Apple Credit Corporation**
Headquarters Building
547 Amboy Street
Boston, MA 02134

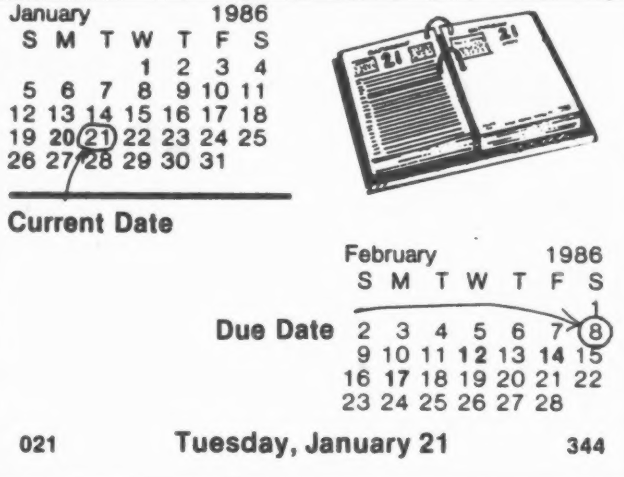
595P 0260 1108910 7

Amount Enclosed $ ______

| Date Month Day | Transaction Reference | Amount of Transaction |
|---|---|---|
| 01 04 | Payment - Thank You | 105.00 CR |

| Account Number | Billing Date | Due Date | Minimum Payment Due |
|---|---|---|---|
| 595P 0260 1108910 7 | 01/15/86 | 02/08/86 | 105.00 |

5. Compare the current date with the due date.



January 1986

| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  |  | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 |  |

**Current Date**

February 1986

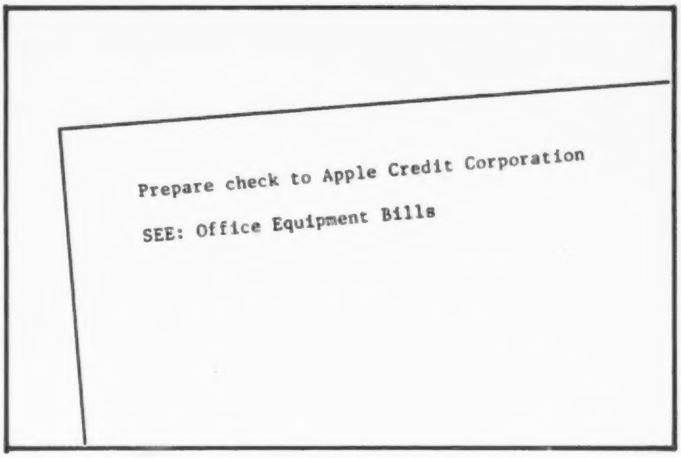
| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|
|  |  |  |  |  |  | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 |  |

**Due Date**

021 **Tuesday, January 21** 344

**NOTE:** Go directly to the company payment policy (Step 12) if the bill needs to be paid within five days; otherwise, continue.

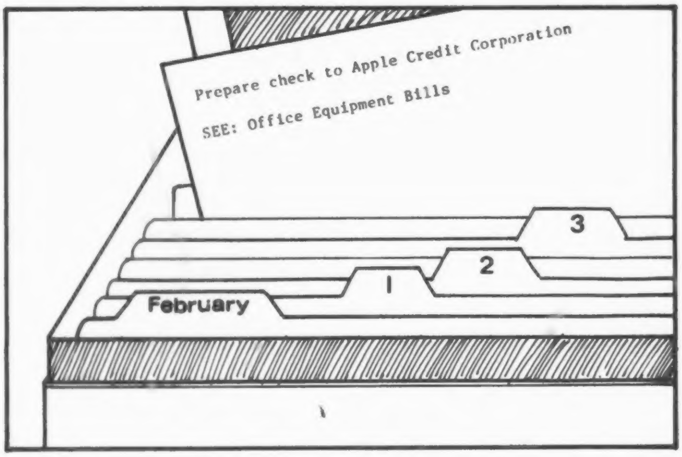
6. Prepare a tickler card if the due date is more than five days away.



Prepare check to Apple Credit Corporation

SEE: Office Equipment Bills

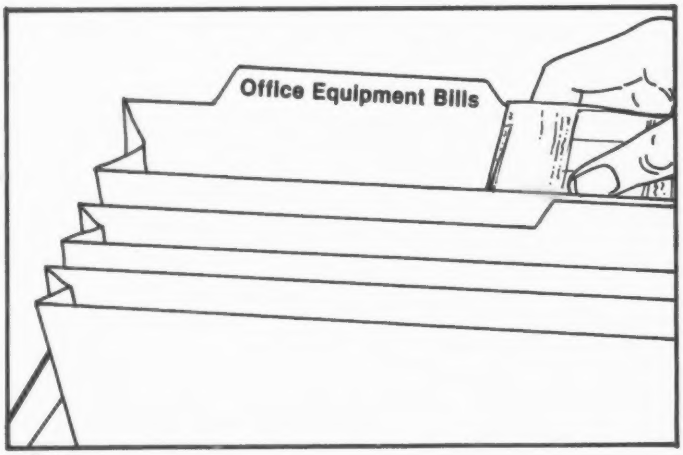
7. Place the card in the tickler file.



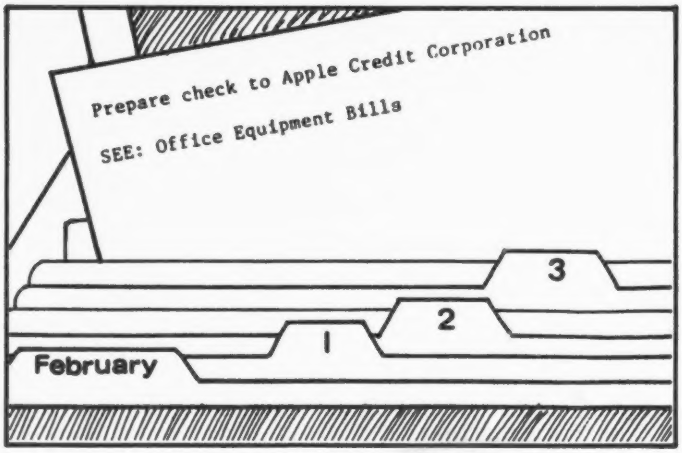
Prepare check to Apple Credit Corporation

SEE: Office Equipment Bills

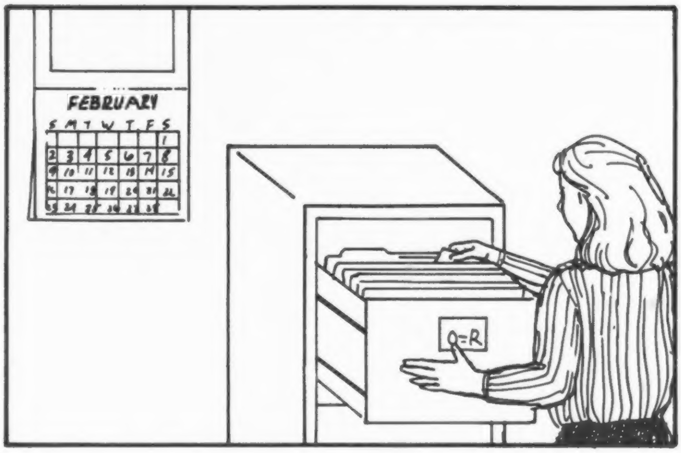
8. File the bill in an appropriate folder



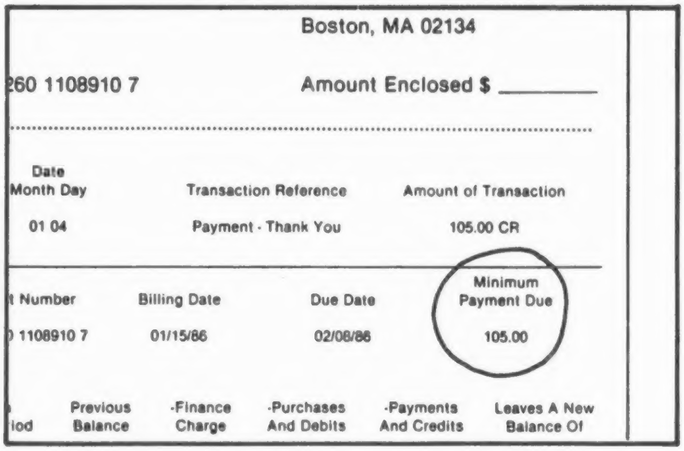
9. Check the tickler file at the beginning of each work day for bills that need to be paid.


Prepare check to Apple Credit Corporation
SEE: Office Equipment Bills
3
2
1
February

10. Retrieve the bill from the file.



11. Determine the amount due.


Boston, MA 02134

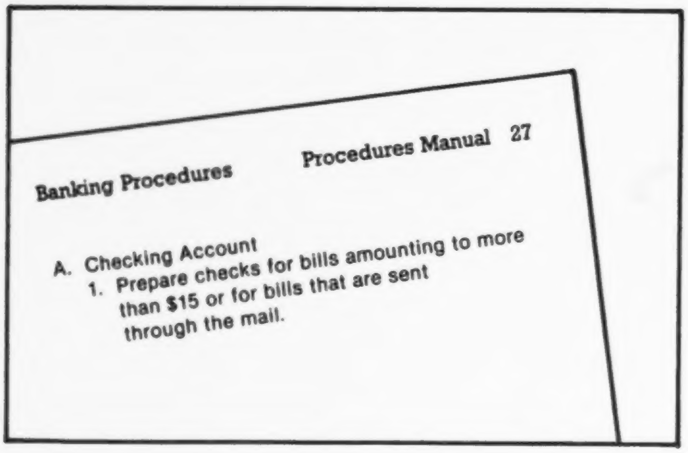
260 1108910 7 Amount Enclosed $ ________

| Date Month Day | Transaction Reference | Amount of Transaction |
|---|---|---|
| 01 04 | Payment - Thank You | 105.00 CR |

| Number | Billing Date | Due Date | Minimum Payment Due |
|---|---|---|---|
| 1108910 7 | 01/15/86 | 02/08/86 | 105.00 |

| iod | Previous Balance | -Finance Charge | -Purchases And Debits | -Payments And Credits | Leaves A New Balance Of |
|---|---|---|---|---|---|

12. Follow company policy in deciding whether to pay out of petty cash funds or whether to write a check.



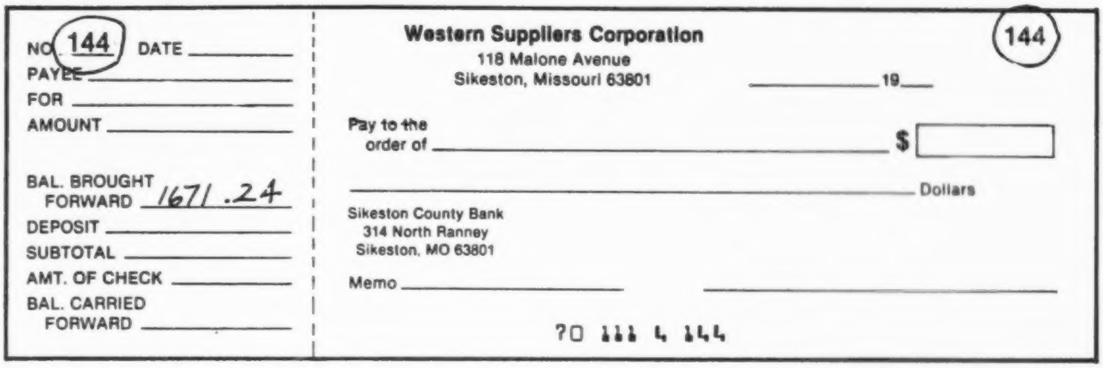
Banking Procedures Procedures Manual 27

A. Checking Account
  1. Prepare checks for bills amounting to more than $15 or for bills that are sent through the mail.

## C. Steps for Preparing a Check Stub or Register

1. Assemble necessary supplies.

Pen



NO. 144 DATE ______
PAYEE ______
FOR ______
AMOUNT ______

BAL. BROUGHT FORWARD 1671.24
DEPOSIT ______
SUBTOTAL ______
AMT. OF CHECK ______
BAL. CARRIED FORWARD ______

**Western Suppliers Corporation**
118 Malone Avenue
Sikeston, Missouri 63801

144

______ 19__

Pay to the order of ______ $

______ Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

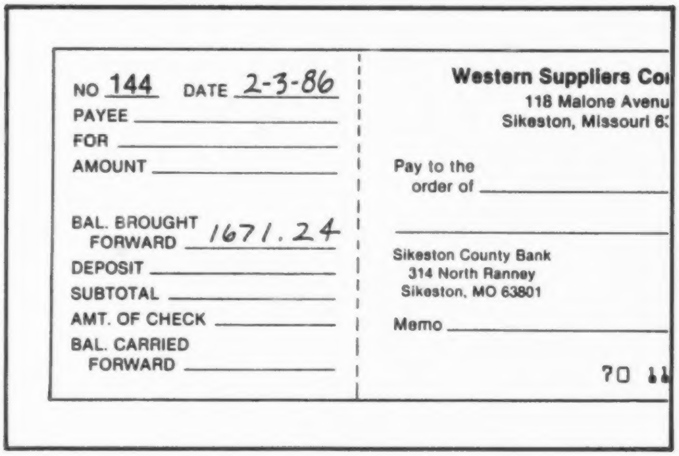
Memo ______

70 111 4 144

Check Stub

Check

2. Write in the exact date the check is written. (Use figures.)



NO 144 DATE 2-3-86
PAYEE ______
FOR ______
AMOUNT ______

BAL. BROUGHT FORWARD 1671.24
DEPOSIT ______
SUBTOTAL ______
AMT. OF CHECK ______
BAL. CARRIED FORWARD ______

**Western Suppliers Co**
118 Malone Avenu
Sikeston, Missouri 6

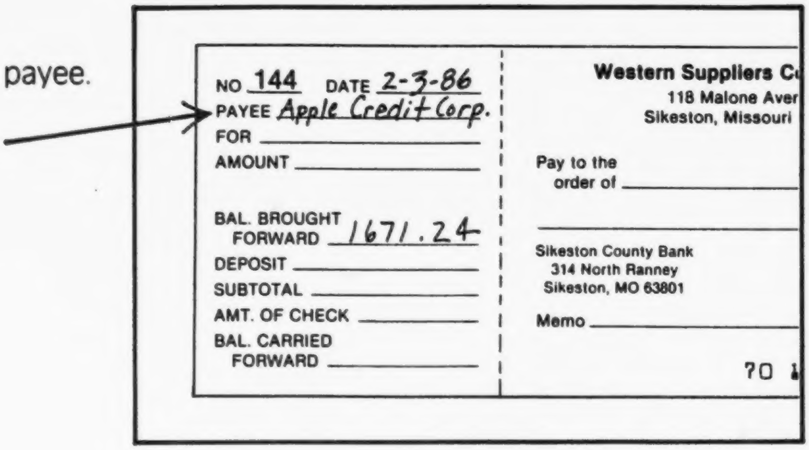
Pay to the order of ______

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo ______

70 11

3. Write in the name of the payee.



NO 144 DATE 2-3-86
PAYEE Apple Credit Corp.
FOR
AMOUNT
BAL. BROUGHT FORWARD 1671.24
DEPOSIT
SUBTOTAL
AMT. OF CHECK
BAL. CARRIED FORWARD

**Western Suppliers C**
118 Malone Aver
Sikeston, Missouri

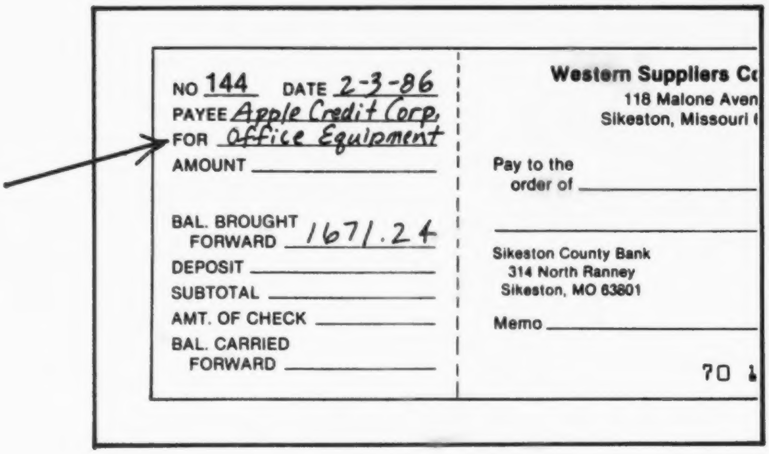
Pay to the order of

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo

70 1

4. Enter the reason for the payment.



NO 144 DATE 2-3-86
PAYEE Apple Credit Corp.
FOR Office Equipment
AMOUNT
BAL. BROUGHT FORWARD 1671.24
DEPOSIT
SUBTOTAL
AMT. OF CHECK
BAL. CARRIED FORWARD

**Western Suppliers C**
118 Malone Aven
Sikeston, Missouri

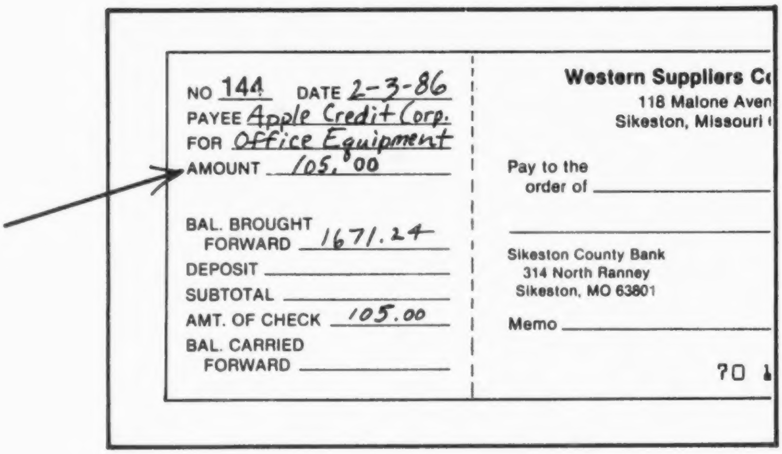
Pay to the order of

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo

70 1

5. Fill in the amount of the payment.



NO 144 DATE 2-3-86
PAYEE Apple Credit Corp.
FOR Office Equipment
AMOUNT 105.00
BAL. BROUGHT FORWARD 1671.24
DEPOSIT
SUBTOTAL
AMT. OF CHECK 105.00
BAL. CARRIED FORWARD

**Western Suppliers C**
118 Malone Aven
Sikeston, Missouri

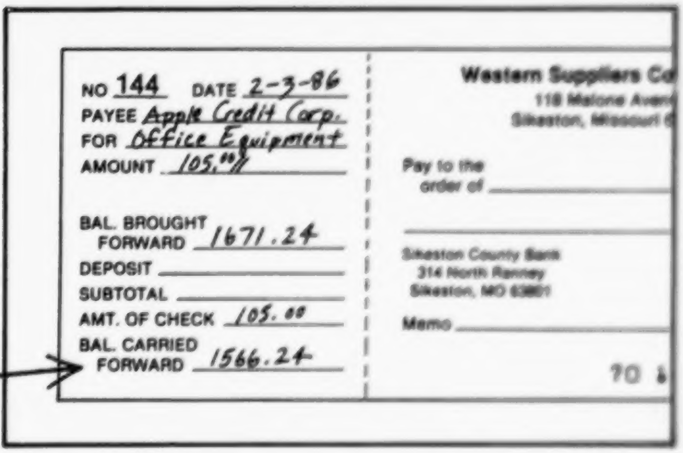
Pay to the order of

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo

70 1

6. Subtract the amount of the payment to determine the balance carried forward.



NO 144 DATE 2-3-86
PAYEE Apple Credit Corp.
FOR Office Equipment
AMOUNT 105.00/
BAL. BROUGHT FORWARD 1671.24
DEPOSIT
SUBTOTAL
AMT. OF CHECK 105.00
BAL. CARRIED FORWARD 1566.24

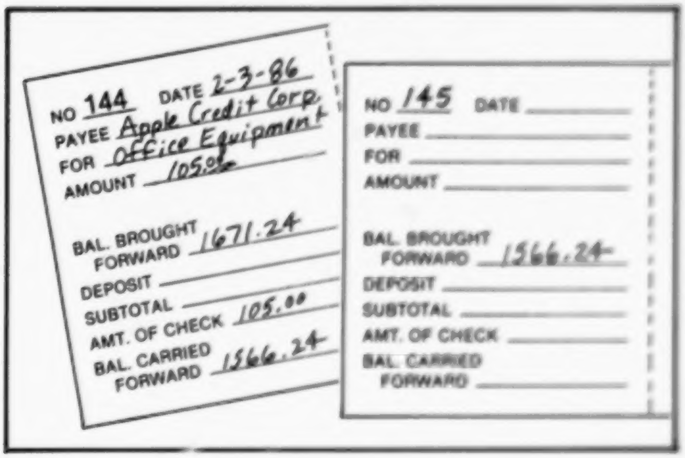
**Western Suppliers Co**
118 Malone Aven
Sikeston, Missouri

Pay to the order of

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo

7. Repeat the balance on the next check stub.



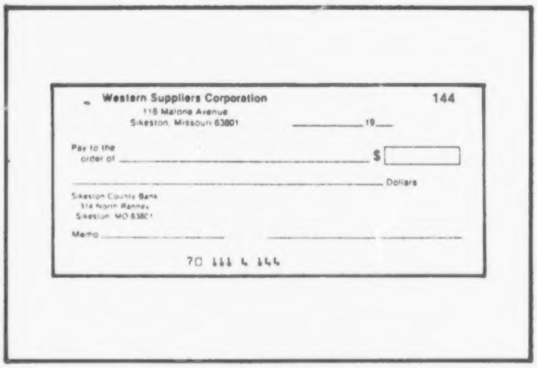
NO 144 DATE 2-3-86
PAYEE Apple Credit Corp.
FOR Office Equipment
AMOUNT 105.00
BAL. BROUGHT FORWARD 1671.24
DEPOSIT
SUBTOTAL
AMT. OF CHECK 105.00
BAL. CARRIED FORWARD 1566.24

NO 145 DATE
PAYEE
FOR
AMOUNT
BAL. BROUGHT FORWARD 1566.24
DEPOSIT
SUBTOTAL
AMT. OF CHECK
BAL. CARRIED FORWARD

## D. Steps for Writing a Check

1. Assemble the necessary supplies.

Pen



**Western Suppliers Corporation** 144
118 Malone Avenue
Sikeston, Missouri 63801 ____________19___

Pay to the
order of ________________________________ $

________________________________ Dollars

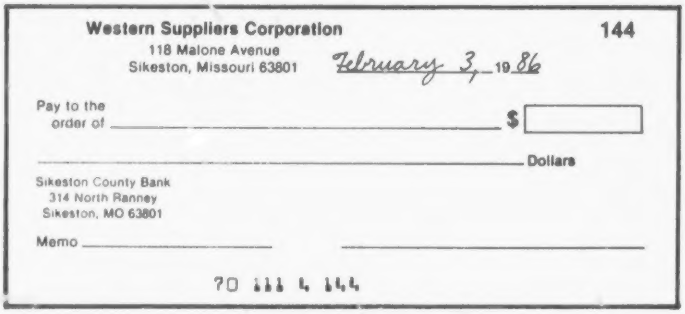
Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo ______________ ______________

70 111 4 144

Blank Check

2. Fill in the current date with an ink pen, cr the checks can be typewritten.
   - Spell out the month.
   - Place a comma after the day.
   - Fill in the year.



**Western Suppliers Corporation** 144
118 Malone Avenue
Sikeston, Missouri 63801 February 3, 1986

Pay to the
order of ________________________________ $

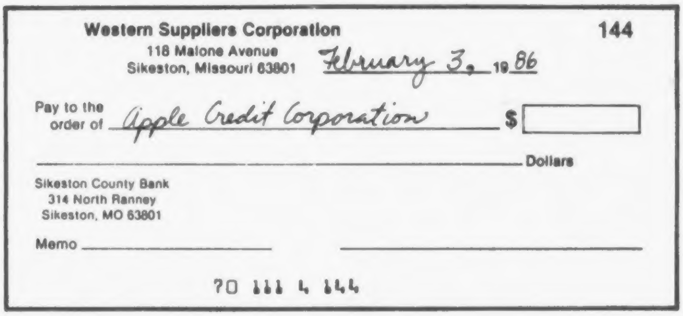
________________________________ Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo ______________ ______________

70 111 4 144

3. Fill in the name of the payee as indicated on the statement.



**Western Suppliers Corporation** 144
118 Malone Avenue
Sikeston, Missouri 63801 February 3, 19 86

Pay to the order of Apple Credit Corporation $

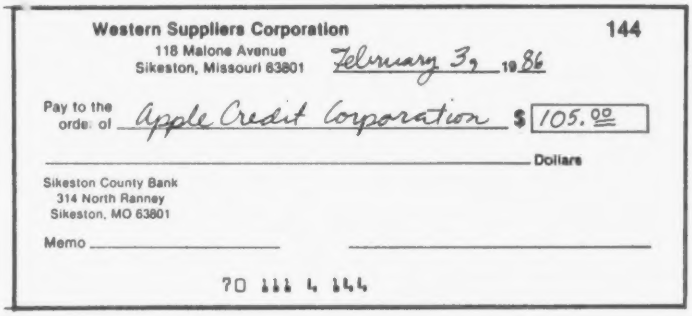
Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo

70 111 4 144

4. Using figures, enter the amount of the check next to the dollar sign.



**Western Suppliers Corporation** 144
118 Malone Avenue
Sikeston, Missouri 63801 February 3, 19 86

Pay to the order of Apple Credit Corporation $ 105.$^{00}$

Dollars

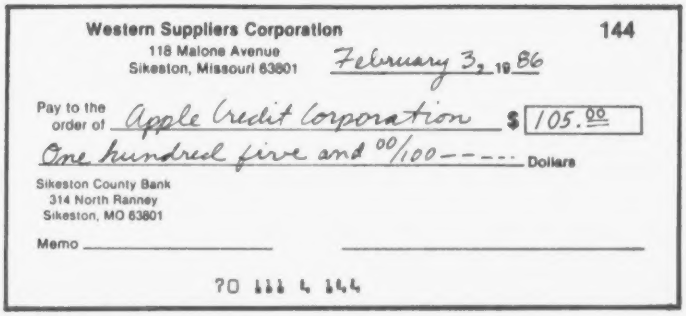
Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo

70 111 4 144

5. Write out in full the amount of the payment.

- Start writing at the extreme left. (Capitalize only the first word.)
- Express cents as a fraction of 100.
- Fill in the rest of the line with a solid line or hyphens when typing.



**Western Suppliers Corporation** 144
118 Malone Avenue
Sikeston, Missouri 63801 February 3, 19 86

Pay to the order of Apple Credit Corporation $ 105.$^{00}$

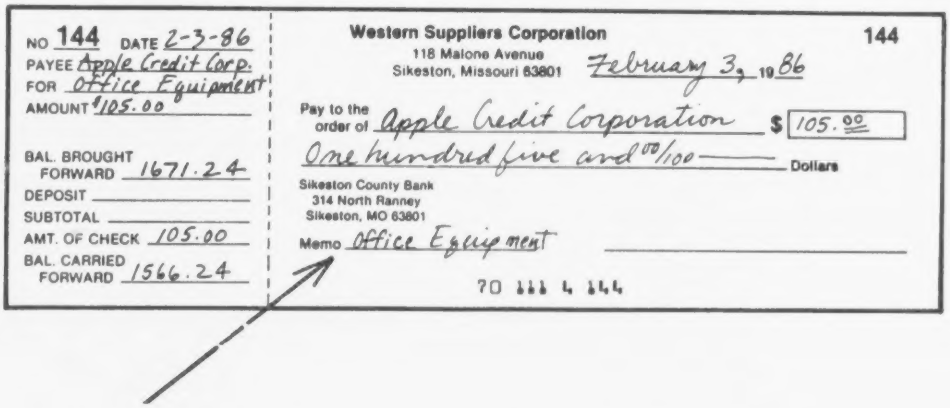
One hundred five and $^{00}/100$----- Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo

70 111 4 144

6. Indicate the reason for the check.



NO 144 DATE 2-3-86
PAYEE Apple Credit Corp.
FOR Office Equipment
AMOUNT $105.00

BAL. BROUGHT FORWARD 1671.24
DEPOSIT
SUBTOTAL
AMT. OF CHECK 105.00
BAL. CARRIED FORWARD 1566.24

**Western Suppliers Corporation**
118 Malone Avenue
Sikeston, Missouri 63801

144

February 3, 19 86

Pay to the order of Apple Credit Corporation $ 105.00

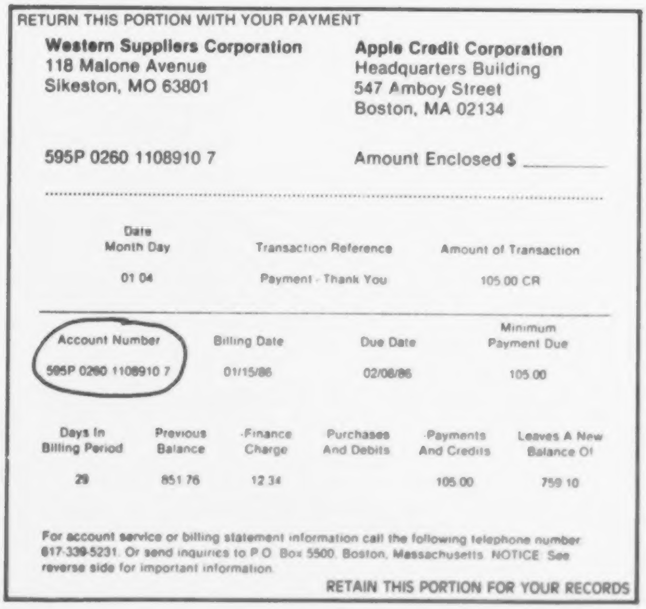
One hundred five and 00/100 Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo Office Equipment

70 111 4 144

7. Look at the statement again to locate the account number.



RETURN THIS PORTION WITH YOUR PAYMENT

**Western Suppliers Corporation**
118 Malone Avenue
Sikeston, MO 63801

**Apple Credit Corporation**
Headquarters Building
547 Amboy Street
Boston, MA 02134

595P 0260 1108910 7

Amount Enclosed $ ______

| Date Month Day | Transaction Reference | Amount of Transaction |
|---|---|---|
| 01 04 | Payment - Thank You | 105.00 CR |

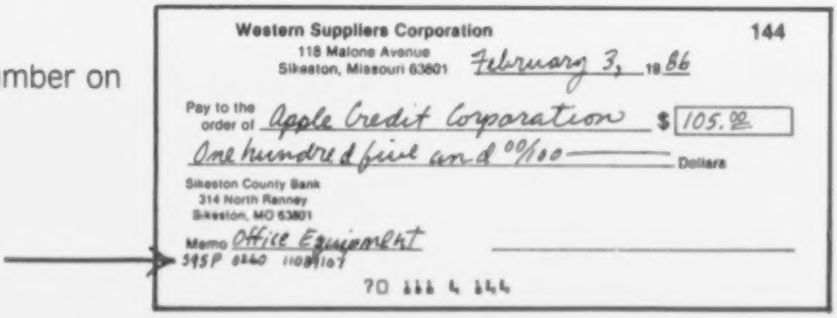
| Account Number | Billing Date | Due Date | Minimum Payment Due |
|---|---|---|---|
| 595P 0260 1108910 7 | 01/15/86 | 02/08/86 | 105.00 |

| Days In Billing Period | Previous Balance | -Finance Charge | Purchases And Debits | -Payments And Credits | Leaves A New Balance Of |
|---|---|---|---|---|---|
| 29 | 851.76 | 12.34 | | 105.00 | 759.10 |

For account service or billing statement information call the following telephone number 617-339-5231. Or send inquiries to P.O. Box 5500, Boston, Massachusetts. NOTICE: See reverse side for important information.

RETAIN THIS PORTION FOR YOUR RECORDS

8. Write in the account number on the check.



**Western Suppliers Corporation**
118 Malone Avenue
Sikeston, Missouri 63801

144

February 3, 19 86

Pay to the order of Apple Credit Corporation $ 105.00

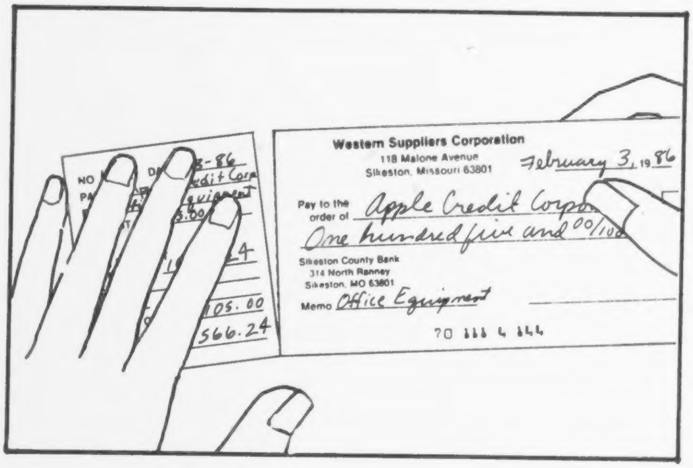
One hundred five and 00/100 Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo Office Equipment
595P 0260 11089107

70 111 4 144

9. Detach the check from the stub.



**Western Suppliers Corporation**
118 Malone Avenue
Sikeston, Missouri 63801

February 3, 19 86

Pay to the order of Apple Credit Corpo

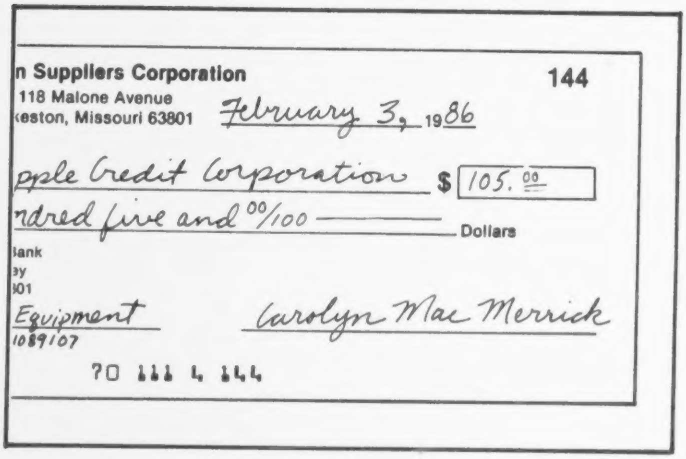
One hundred five and 00/10

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo Office Equipment

70 111 4 144

10. Secure an authorized signature from your supervisor or a company executive.



**n Suppliers Corporation** 144
118 Malone Avenue
keston, Missouri 63801 February 3, 19 86

pple Credit Corporation $ 105. 00

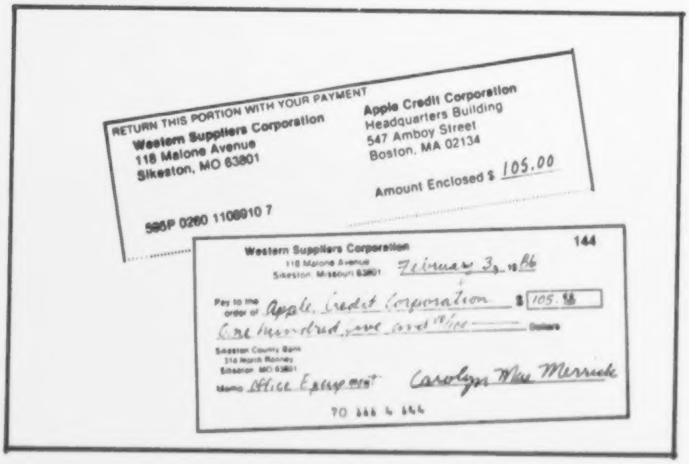
ndred five and 00/100 Dollars

Bank
ey
301

Equipment Carolyn Mae Merrick
1089107

70 111 4 144

11. Place the check and return part of the statement in the return envelope provided by the creditor. Look for "Return this portion with you payment."



RETURN THIS PORTION WITH YOUR PAYMENT
**Western Suppliers Corporation**
118 Malone Avenue
Sikeston, MO 63801

**Apple Credit Corporation**
Headquarters Building
547 Amboy Street
Boston, MA 02134

Amount Enclosed $ 105.00

596P 0260 1106910 7

**Western Suppliers Corporation** 144
118 Malone Avenue
Sikeston, Missouri 63801 February 3, 19 86

Pay to the order of Apple Credit Corporation $ 105.00

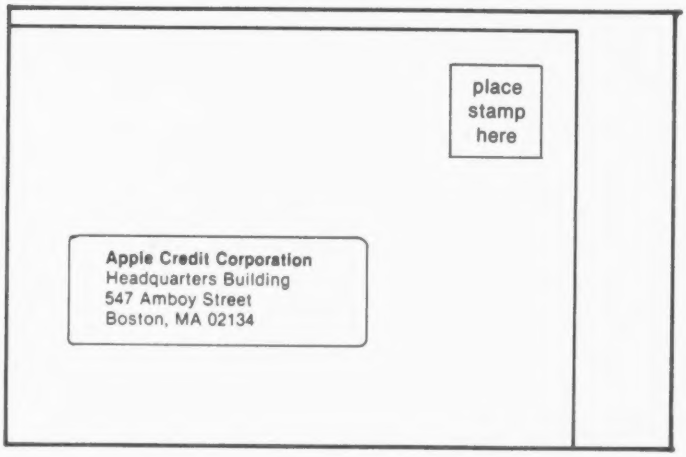
One hundred five and 00/100 Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

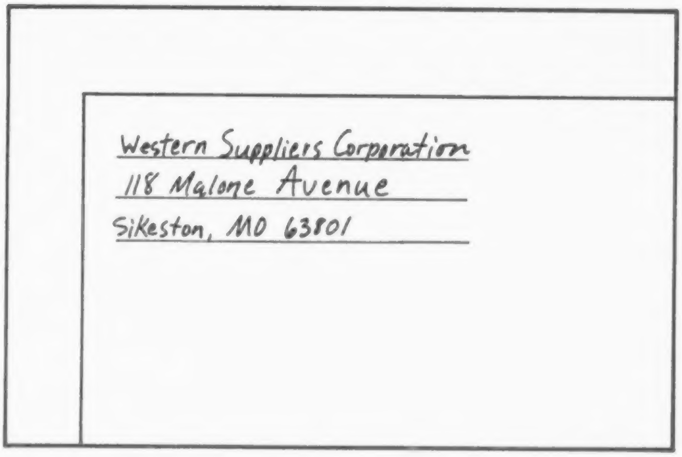
Memo Office Equipment Carolyn Mae Merrick

70 111 4 144

12. Check to see that the address shows through the window.

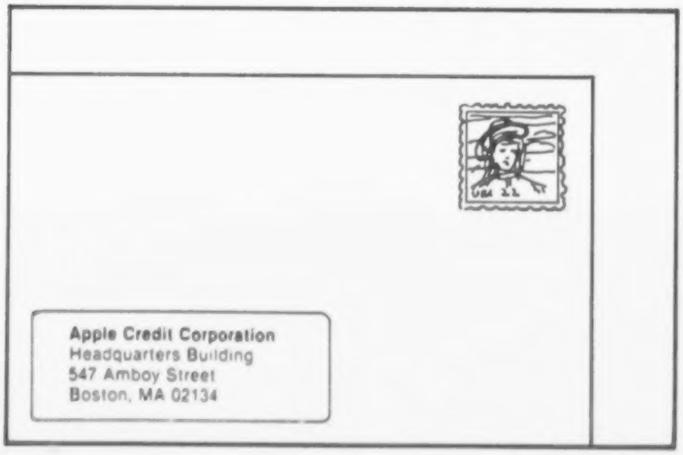


13. Write in the company's name and address in the blanks provided on the envelope.



Western Suppliers Corporation
118 Malone Avenue
Sikeston, MO 63801

14. Seal the envelope and attach the postage.

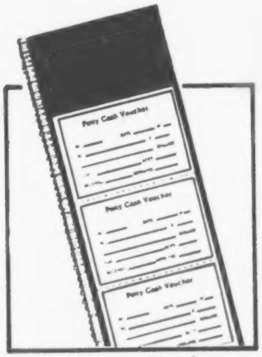


## E. Steps for Preparing a Petty Cash Voucher

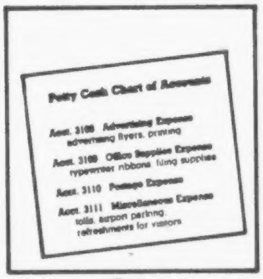
1. Assemble the necessary equipment.

St. Louis
Airport
.90
Feb. 3 86
Thank You

Bill or Receipt



Petty Cash Voucher



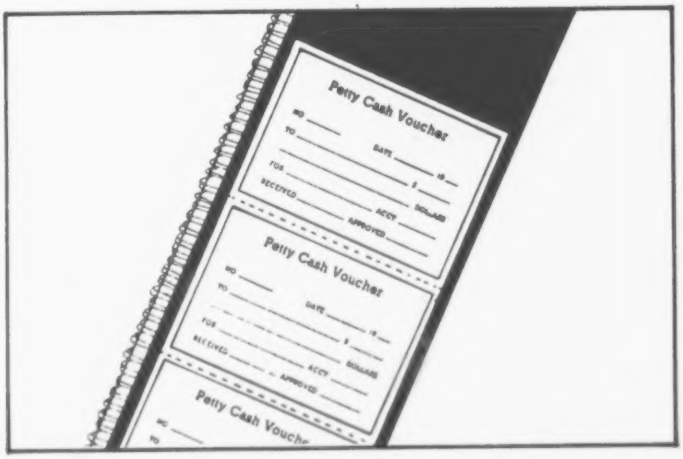
Petty Cash Chart of Accounts

Acct. 3108 Advertising Expense
advertising flyers, printing
Acct. 3109 Office Supplies Expense
typewriter ribbons, filing supplies
Acct. 3110 Postage Expense
Acct. 3111 Miscellaneous Expense
tolls, airport parking,
refreshments for visitors

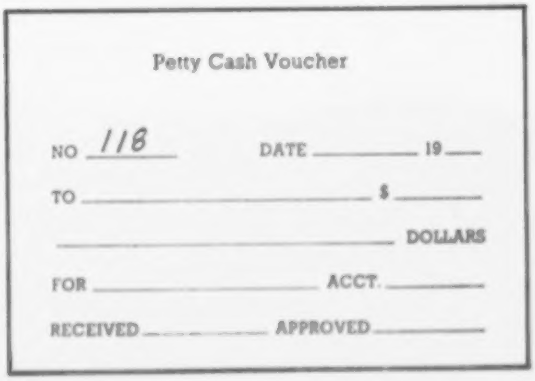
Chart of Accounts

Petty Cash Box

2. Locate the number given to the previous petty cash voucher. (See carbon copy.)



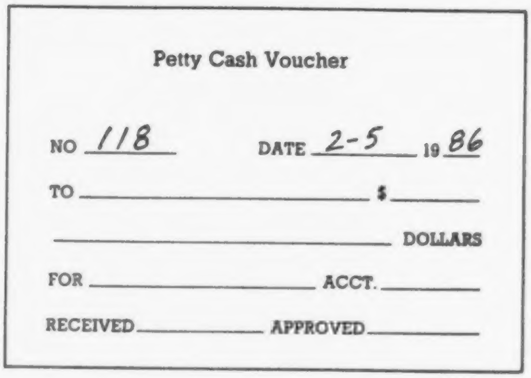
3. Enter the number for this petty cash voucher.



Petty Cash Voucher

NO 118 DATE ________ 19____
TO ______________________ $ ________
______________________ DOLLARS
FOR ______________ ACCT. ________
RECEIVED ____________ APPROVED ____________

4. Write in the exact date the voucher is written.



**Petty Cash Voucher**

NO 118 DATE 2-5 19 86

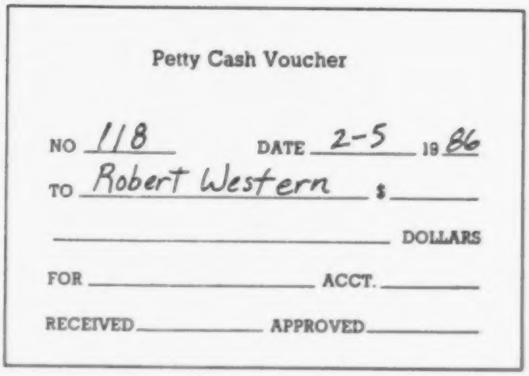
TO $

DOLLARS

FOR ACCT.

RECEIVED APPROVED

5. Enter the name of the payee.



**Petty Cash Voucher**

NO 118 DATE 2-5 19 86

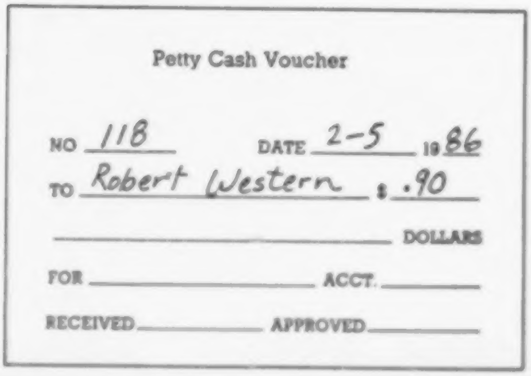
TO Robert Western $

DOLLARS

FOR ACCT.

RECEIVED APPROVED

6. Enter the amount in figures.



**Petty Cash Voucher**

NO 118 DATE 2-5 19 86

TO Robert Western $ .90

DOLLARS

FOR ACCT.

RECEIVED APPROVED

7. Enter the amount spelled out.

**Petty Cash Voucher**

NO 118 DATE 2-5 19 86
TO Robert Western $ .90
Ninety cents DOLLARS
FOR ACCT.
RECEIVED APPROVED

8. Enter a memo describing the purchase.

**Petty Cash Voucher**

NO 118 DATE 2-5 19 86
TO Robert Western $ .90
Ninety cents DOLLARS
FOR Airport Parking ACCT.
RECEIVED APPROVED

9. Refer to the chart of accounts and accompanying explanation to determine the account to be charged.

**Petty Cash Chart of Accounts**

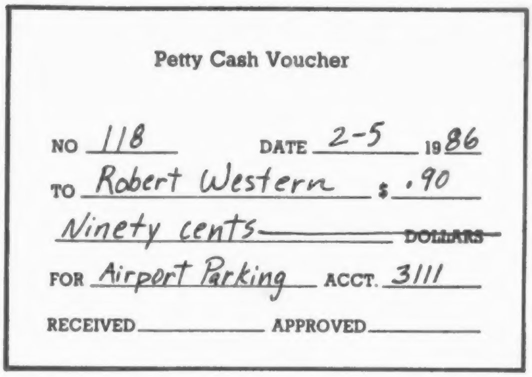
**Acct. 3108 Advertising Expense**
advertising flyers, printing

**Acct. 3109 Office Supplies Expense**
typewriter ribbons, filing supplies

**Acct. 3110 Postage Expense**

**Acct. 3111 Miscellaneous Expense**
tolls, airport parking, refreshments for visitors.

10. Enter the account number from the chart of accounts in the space provided.



**Petty Cash Voucher**

NO 118 DATE 2-5 1986

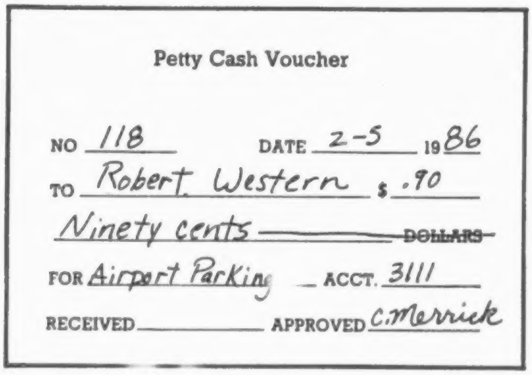
TO Robert Western $ .90

Ninety cents ~~DOLLARS~~

FOR Airport Parking ACCT. 3111

RECEIVED ______ APPROVED ______

11. Obtain an authorized signature for the voucher.



**Petty Cash Voucher**

NO 118 DATE 2-5 1986

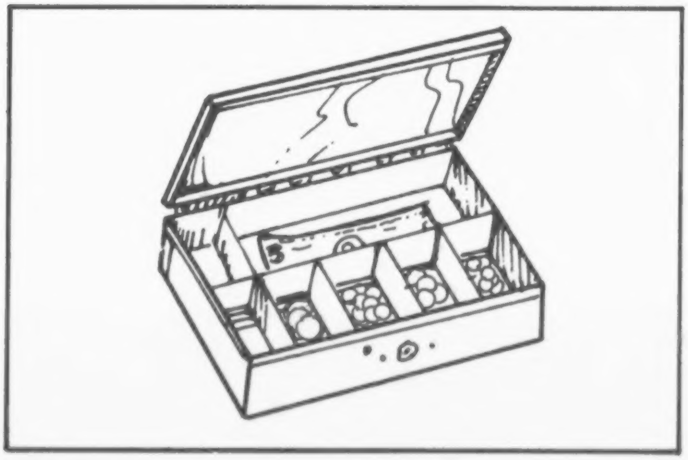
TO Robert Western $ .90

Ninety cents ~~DOLLARS~~

FOR Airport Parking ACCT. 3111

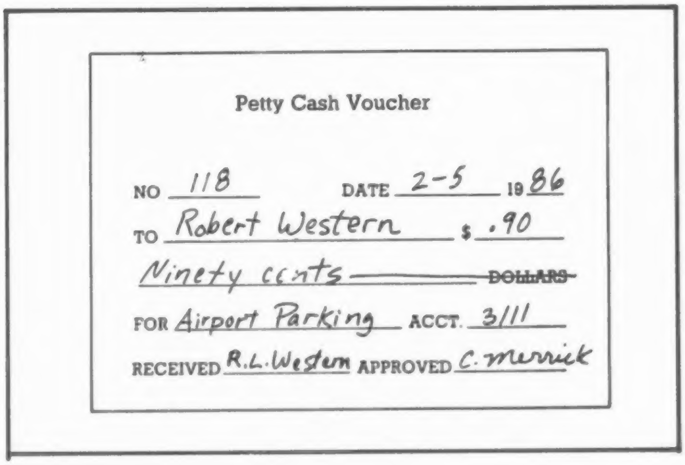
RECEIVED ______ APPROVED C. Merrick

12. Open the petty cash box and count the dollar bills and change needed.
**NOTE:** See Skill Sheet 1 for practice in making change.



13. Deliver the money to the payee.

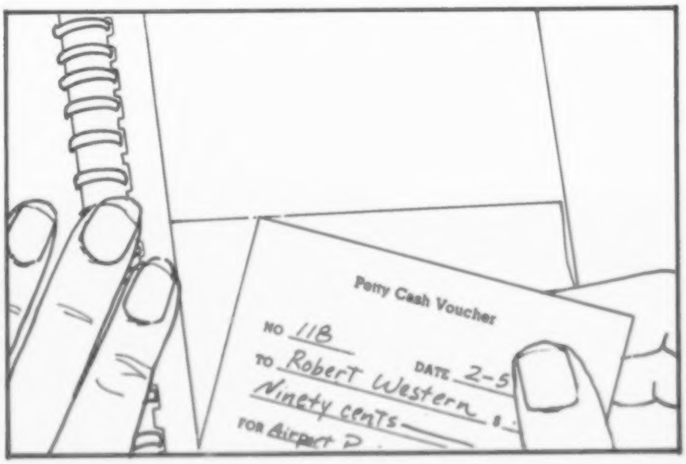
14. Ask the payee to sign the voucher in the space marked "RECEIVED."



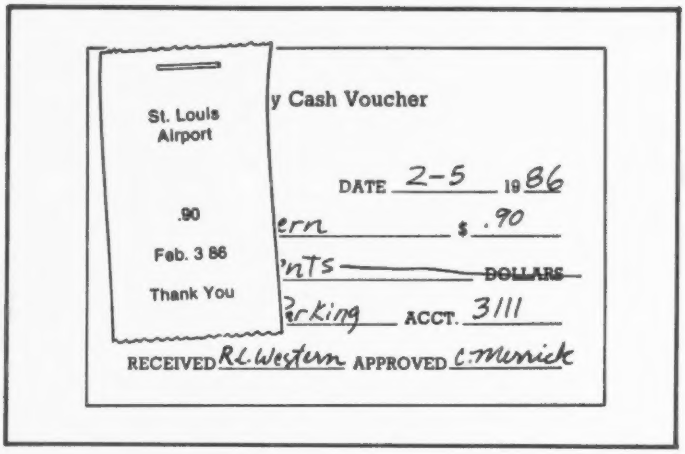
Petty Cash Voucher

NO 118 DATE 2-5 19 86
TO Robert Western $ .90
Ninety cents ——— ~~DOLLARS~~
FOR Airport Parking ACCT. 3/11
RECEIVED R.L. Western APPROVED C. Merrick

15. Tear out the original of the voucher.



16. Staple the receipt to the petty cash voucher.



St. Louis Airport

.90

Feb. 3 86

Thank You

y Cash Voucher

DATE 2-5 19 86

ern $ .90

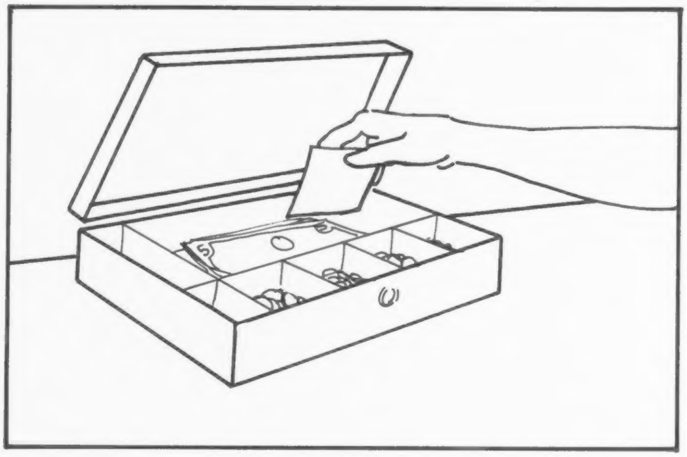
nts ~~DOLLARS~~

rking ACCT. 3111

RECEIVED R.L. Western APPROVED C. Menick

17. Place the voucher in the petty cash box.

**NOTE:** Lock the petty cash box if it is company policy.



## DO SKILL SHEET 1

## Banking
# Skill Sheet 1

**Directions:** Read through the following information on making change and solve the problems listed at the bottom of the page.

Making change has been simplified by cash registers that calculate the amount of change that should be given to the customer. In order to do this, the cashier enters the amount of money offered by the customer and subtracts the amount the customer owes. The cashier then proceeds to count out the amount of change by starting with the largest denomination of currency and coins available and working toward the smallest.

Whenever an authorized office worker needs to give out money from the petty cash box, the process is similar. Two examples of making change are presented here.

1. The sales manager gives you a receipt for the printing of advertising flyers. This means that he has paid the printers, and he needs to be reimbursed for this company expense. The amount of the receipt is $14.89. The sales manager should be given one ten-dollar bill, four one-dollar bills, three quarters, one dime, and four pennies. ($10 plus $4 plus $.75 plus $.10 plus $.04 equals $14.89.)

The following form may be helpful:

| Change Needed | $20 | $10 | $5 | $1 | .25 | .10 | .05 | .01 |
|---|---|---|---|---|---|---|---|---|
| 1. $14.89 | | 1 | | 4 | 3 | 1 | | 4 |
| 2. 6.50 | | | 1 | 1 | 2 | | | |
| 3. | | | | | | | | |
| 4. | | | | | | | | |
| 5. | | | | | | | | |

2. The newspaper girl brings in today's paper. It is also time to pay for the monthly subscription. The cost of the subscription is $6.50. The newspaper girl should be given one five-dollar bill, one one-dollar bill, and two quarters.

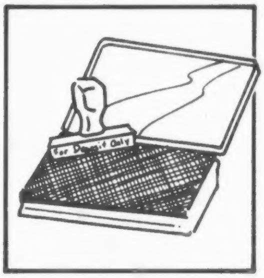
**Problems:** Fill in the form provided above (lines 3 - 5) with the denominations and coins that would add up to these amounts: **$8.45**, **$21.43**, and **$13.54**.

## F. Steps for Completing Deposit Slips

1. Clear work area.
2. Assemble equipment.

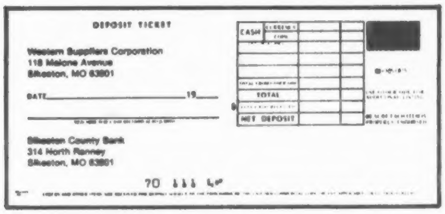
Currency

Coins



Rubber Stamp

Calculator



DEPOSIT TICKET

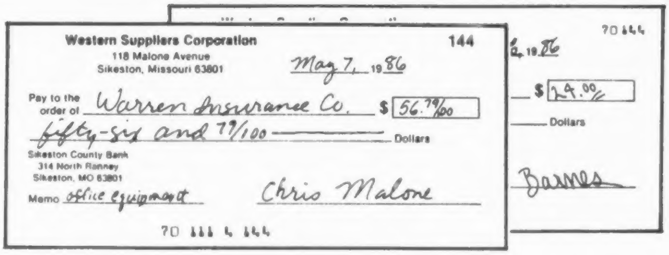
Western Suppliers Corporation
118 Malone Avenue
Sikeston, MO 63801

DATE____________________19____

| | | | |
|---|---|---|---|
| CASH | | | |
| TOTAL | | | |
| NET DEPOSIT | | | |

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Deposit Slip



Western Suppliers Corporation
118 Malone Avenue
Sikeston, Missouri 63801

144

May 7, 1986

Pay to the order of Warren Insurance Co. $ 56.79/100

fifty-six and 79/100 Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo office equipment

Chris Malone

19 86

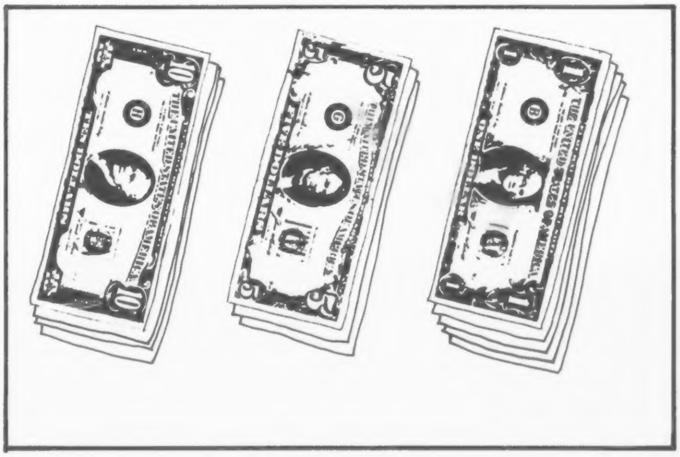
$ 24.00/

Dollars

Barnes

Checks for Depositing

3. Sort the currency into denominations.
4. Put all faces on currency up for ease in counting.

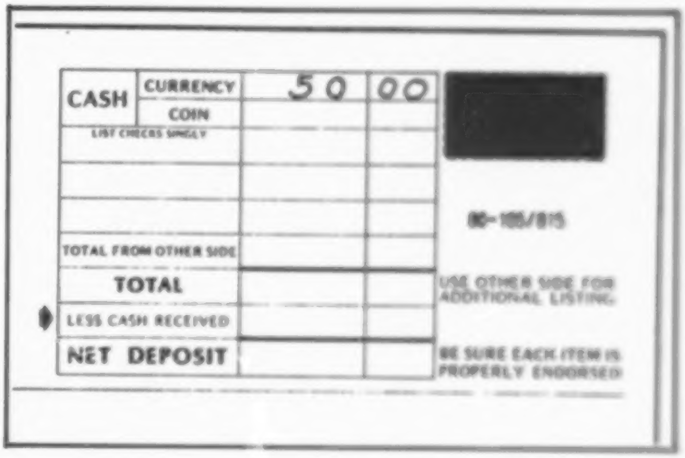


286

5. Determine the total value of the currency.

(3 tens) $10 × 3 = $30
(3 fives) $ 5 × 3 = 15
(5 ones) $ 1 × 5 = 5
total value = $50

6. Enter the total value of the currency on the deposit slip.



| | | | |
|---|---|---|---|
| CASH | CURRENCY | 50 | 00 |
| | COIN | | |
| LIST CHECKS SINGLY | | | |
| | | | |
| | | | |
| TOTAL FROM OTHER SIDE | | | |
| **TOTAL** | | | |
| LESS CASH RECEIVED | | | |
| **NET DEPOSIT** | | | |

[redacted]

USE OTHER SIDE FOR ADDITIONAL LISTING

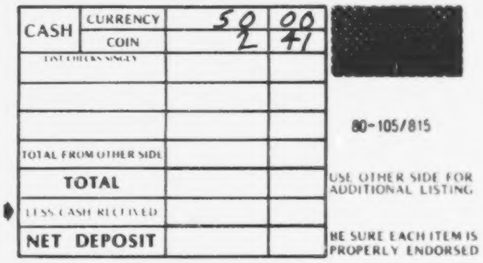
BE SURE EACH ITEM IS PROPERLY ENDORSED

7. Sort the coins into stacks of quarters, dimes, nickels, and pennies.

8. Determine the total value of the coins.

(4 quarters) $0.25 × 4 = $1.00
(8 dimes) $0.10 × 8 = .80
(10 nickels) $0.05 × 10 = .50
(11 pennies) $0.01 × 11 = .11
total value = $2.41

9. Enter the total value of the coins on the deposit slip.



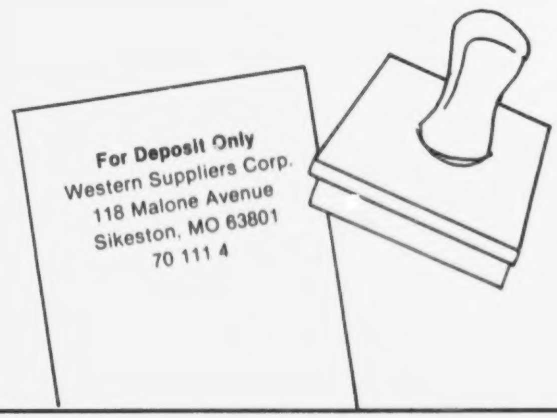
| | | | |
|---|---|---|---|
| CASH | CURRENCY | 50 | 00 |
| | COIN | 2 | 41 |
| LIST CHECKS SINGLY | | | |
| | | | |
| | | | |
| | | | |
| TOTAL FROM OTHER SIDE | | | |
| TOTAL | | | |
| LESS CASH RECEIVED | | | |
| NET DEPOSIT | | | |

80-105/815

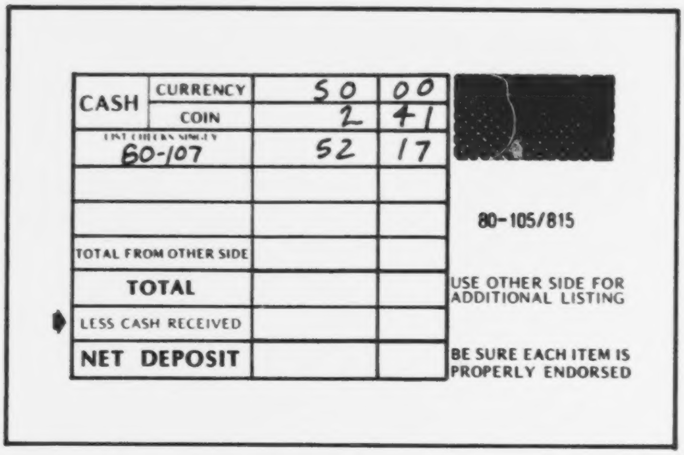
USE OTHER SIDE FOR ADDITIONAL LISTING

BE SURE EACH ITEM IS PROPERLY ENDORSED

10. Stamp each check with the restrictive endorsement.



11. List checks individually. Identify them by name of bank or by the number written as a fraction in the upper right hand corner of the check.



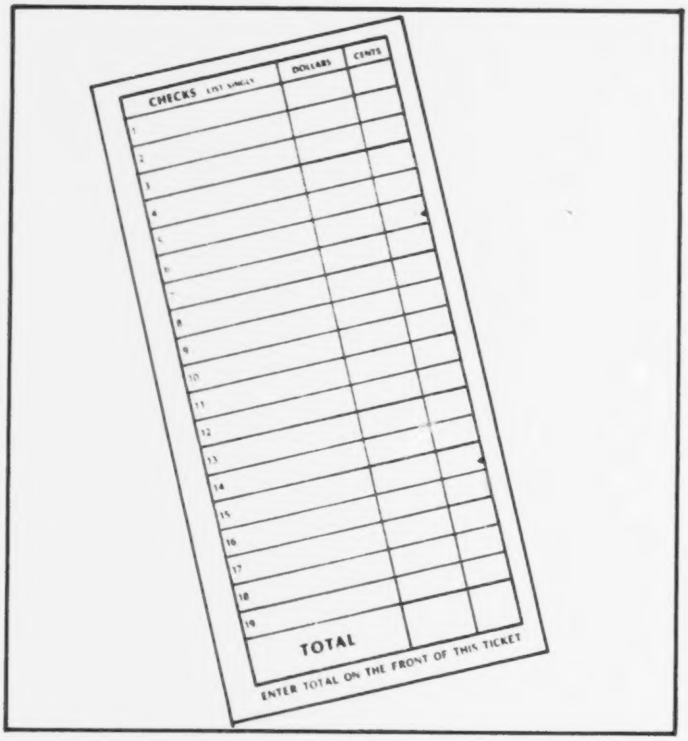
| | | | |
|---|---|---|---|
| CASH | CURRENCY | 50 | 00 |
| | COIN | 2 | 41 |
| LIST CHECKS SINGLY<br>60-107 | | 52 | 17 |
| | | | |
| | | | |
| TOTAL FROM OTHER SIDE | | | |
| TOTAL | | | |
| LESS CASH RECEIVED | | | |
| NET DEPOSIT | | | |

80-105/815

USE OTHER SIDE FOR ADDITIONAL LISTING

BE SURE EACH ITEM IS PROPERLY ENDORSED

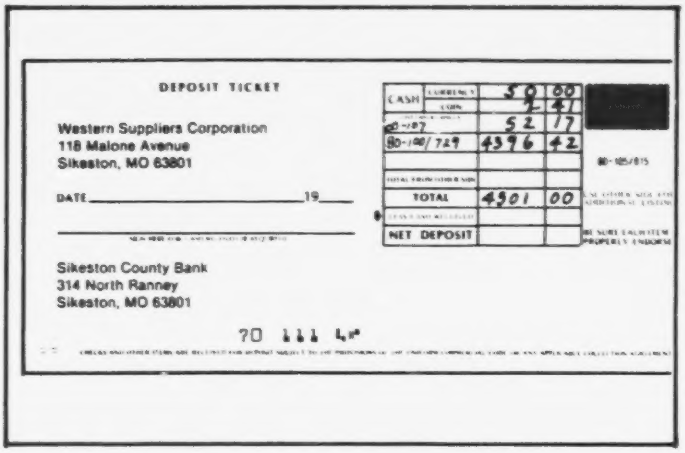
**NOTE:** If there are more than 3 checks, list them on the back of the deposit slip or list them on an adding machine and attach the tape to the deposit slip.



| CHECKS LIST SINGLY | DOLLARS | CENTS |
|---|---|---|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |
| 6 | | |
| 7 | | |
| 8 | | |
| 9 | | |
| 10 | | |
| 11 | | |
| 12 | | |
| 13 | | |
| 14 | | |
| 15 | | |
| 16 | | |
| 17 | | |
| 18 | | |
| 19 | | |
| TOTAL | | |

ENTER TOTAL ON THE FRONT OF THIS TICKET

12. Total the deposit slip.



DEPOSIT TICKET

Western Suppliers Corporation
118 Malone Avenue
Sikeston, MO 63801

DATE ______________ 19____

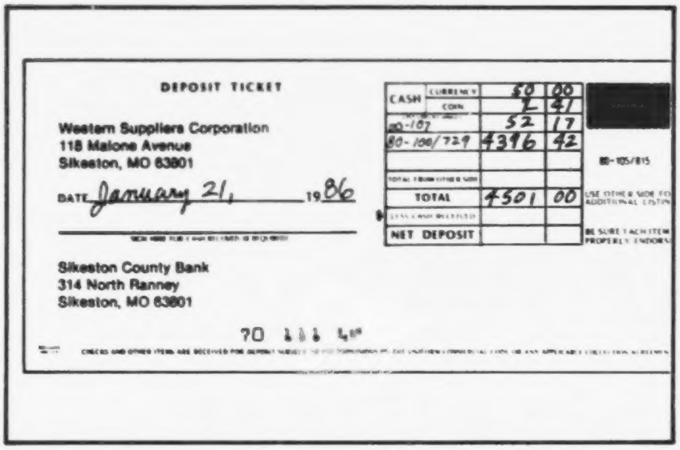
| | | |
|---|---|---|
| CASH CURRENCY | 50 | 00 |
| COIN | 2 | 41 |
| 80-107 | 52 | 17 |
| 80-100/729 | 4396 | 42 |
| | | |
| TOTAL FROM OTHER SIDE | | |
| TOTAL | 4501 | 00 |
| LESS CASH RECEIVED | | |
| NET DEPOSIT | | |

80-105/815

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

70 111 4

13. Fill in the date of the deposit.



DEPOSIT TICKET

Western Suppliers Corporation
118 Malone Avenue
Sikeston, MO 63801

DATE January 21, 1986

| | | |
|---|---|---|
| CASH CURRENCY | 50 | 00 |
| COIN | 2 | 41 |
| 80-107 | 52 | 17 |
| 80-100/729 | 4396 | 42 |
| | | |
| TOTAL FROM OTHER SIDE | | |
| TOTAL | 4501 | 00 |
| LESS CASH RECEIVED | | |
| NET DEPOSIT | | |

80-105/815

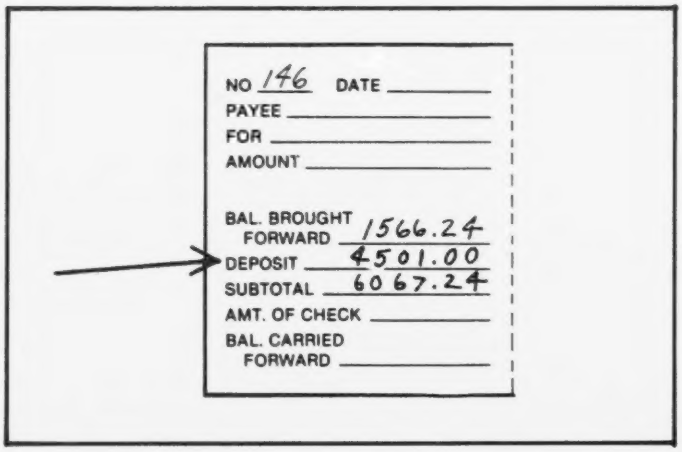
USE OTHER SIDE FOR ADDITIONAL LISTING

BE SURE EACH ITEM IS PROPERLY ENDORSED

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

70 111 4

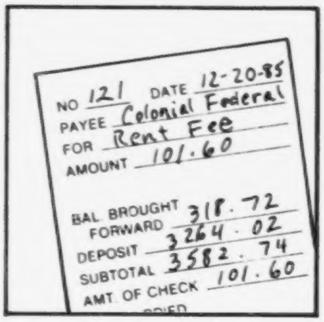
14. Enter the total in the check stubs or check register.



NO 146 DATE ______
PAYEE ______
FOR ______
AMOUNT ______
BAL. BROUGHT FORWARD 1566.24
DEPOSIT 4501.00
SUBTOTAL 6067.24
AMT. OF CHECK ______
BAL. CARRIED FORWARD ______

## G. Steps for Reconciling Bank Statements

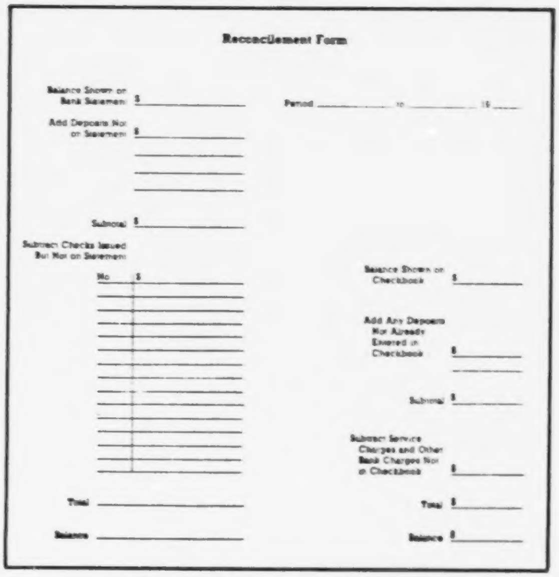
1. Assemble the necessary equipment.



NO 121 DATE 12-20-85
PAYEE Colonial Federal
FOR Rent Fee
AMOUNT 101.60
BAL. BROUGHT FORWARD 318.72
DEPOSIT 3264.02
SUBTOTAL 3582.74
AMT. OF CHECK 101.60

Check Stubs

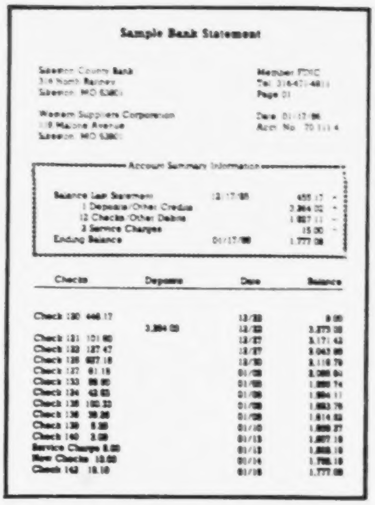
Calculator



**Reconcilement Form**

Balance Shown on Bank Statement $ ______
Period ______ to ______ 19 ____
Add Deposits Not on Statement $ ______
Subtotal $ ______
Subtract Checks Issued But Not on Statement
No. $
Total ______
Balance ______
Balance Shown on Checkbook $ ______
Add Any Deposits Not Already Entered in Checkbook $ ______
Subtotal $ ______
Subtract Service Charges and Other Bank Charges Not in Checkbook $ ______
Total $ ______
Balance $ ______

Reconcilement Form

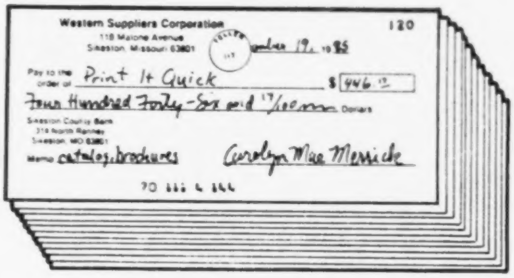


**Sample Bank Statement**

Account Summary Information

Checks Deposits Date Balance

Bank Statement



Western Suppliers Corporation
118 Malone Avenue
Sikeston, Missouri 63801

120

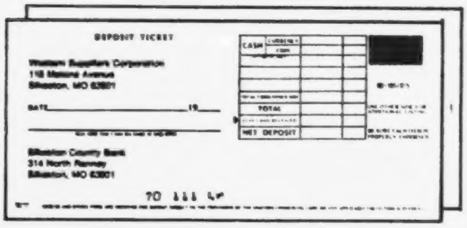
Pay to the order of Print It Quick $ 446.17
Four Hundred Forty-Six and 17/100 Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo catalogs, brochures
Carolyn Mae Messick

70 111 4 144

Cancelled Checks



DEPOSIT TICKET

Western Suppliers Corporation
118 Malone Avenue
Sikeston, MO 63801

DATE ______ 19 ____

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

CASH
TOTAL
NET DEPOSIT

70 111 4P

Deposit Slips

2. Look for the account summary information on the bank statement.

**Account Summary Information**

| | | | |
|---|---|---|---|
| Balance Last Statement | 12/17/85 | 455.17 | + |
| 1 Deposits/Other Credits | | 3,264.02 | + |
| 12 Checks/Other Debits | | 1,927.11 | − |
| 2 Service Charges | | 15.00 | − |
| Ending Balance | 01/17/86 | 1,777.08 | |

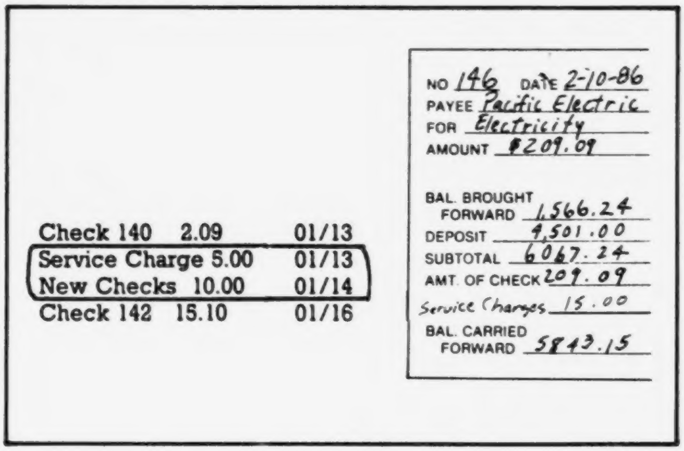
3. Check to see if there is an amount listed under "Service Charges."

**Account Summary Information**

| | | | |
|---|---|---|---|
| Balance Last Statement | 12/17/85 | 455.17 | + |
| 1 Deposits/Other Credits | | 3,264.02 | + |
| 12 Checks/Other Debits | | 1,927.11 | − |
| 2 Service Charges | | 15.00 | − |
| Ending Balance | 01/17/86 | 1,777.08 | |

4. Enter the description and amount of the service charges in the check register or the last check stub.

5. Deduct these service charges to bring the checkbook balance up to date.

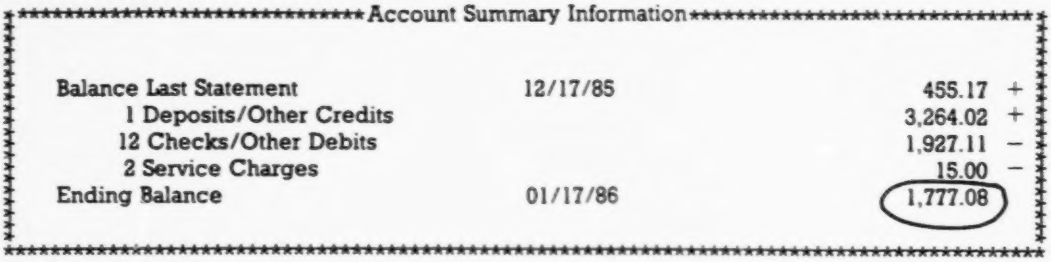


| | | |
|---|---|---|
| Check 140 | 2.09 | 01/13 |
| Service Charge | 5.00 | 01/13 |
| New Checks | 10.00 | 01/14 |
| Check 142 | 15.10 | 01/16 |

NO 146 DATE 2-10-86
PAYEE Pacific Electric
FOR Electricity
AMOUNT $209.09

BAL. BROUGHT FORWARD 1,566.24
DEPOSIT 4,501.00
SUBTOTAL 6067.24
AMT. OF CHECK 209.09
Service Charges 15.00
BAL. CARRIED FORWARD 5843.15

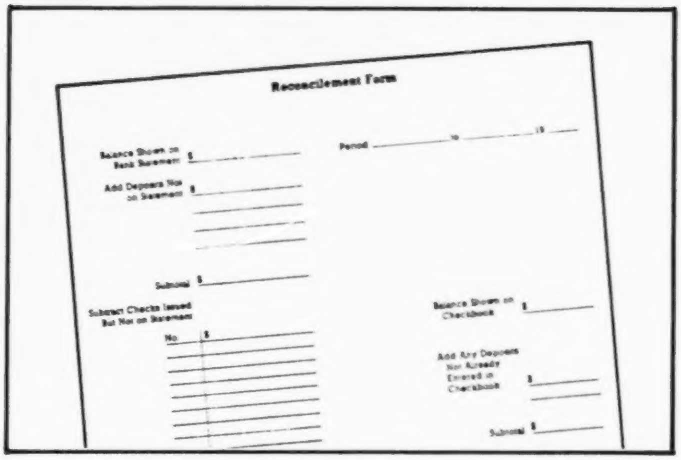
6. Locate the "Ending Balance" shown on the bank statement.



Account Summary Information

| | | | |
|---|---|---|---|
| Balance Last Statement | 12/17/85 | 455.17 | + |
| 1 Deposits/Other Credits | | 3,264.02 | + |
| 12 Checks/Other Debits | | 1,927.11 | − |
| 2 Service Charges | | 15.00 | − |
| Ending Balance | 01/17/86 | 1,777.08 | |

7. Turn the bank statement over to find the reconcilement form provided.



Reconcilement Form

Balance Shown on Bank Statement $ ______

Period ______ to ______ 19 ___

Add Deposits Not on Statement $ ______

Subtotal $ ______

Subtract Checks Issued But Not on Statement

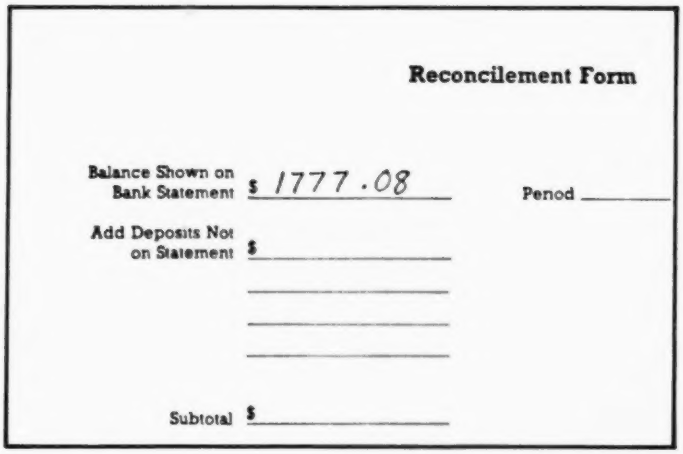
No. $ ______

Balance Shown on Checkbook $ ______

Add Any Deposits Not Already Entered in Checkbook $ ______

Subtotal $ ______

8. Enter the ending balance in the space entitled "Balance Shown on Bank Statement."



**Reconcilement Form**

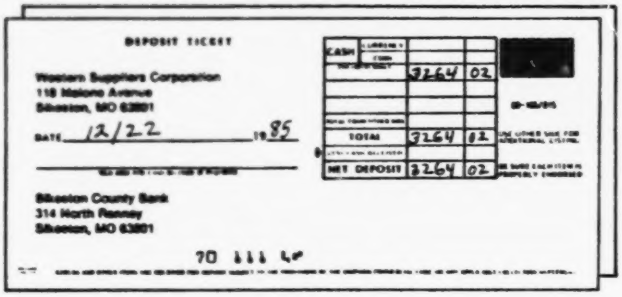
Balance Shown on Bank Statement $ 1777.08

Period ______

Add Deposits Not on Statement $ ______

Subtotal $ ______

9. Pick up the stack of cancelled checks. Sort the stack into Deposit slips and cancelled checks.



DEPOSIT TICKET

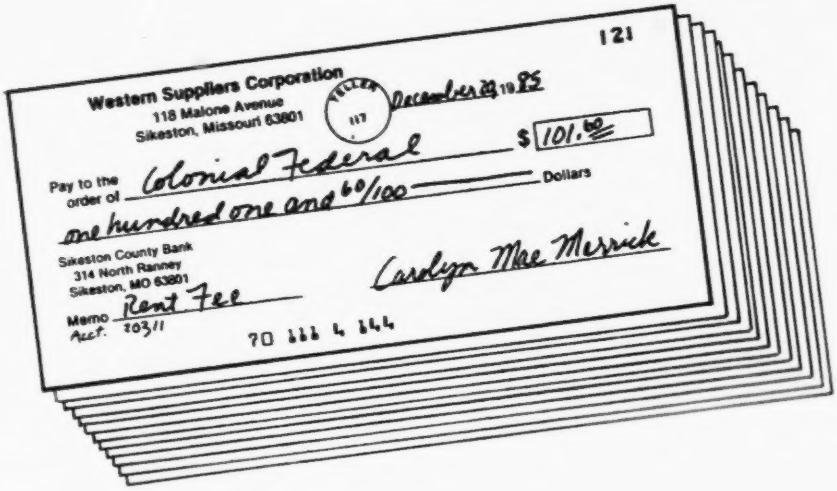
Western Suppliers Corporation
118 Malone Avenue
Sikeston, MO 63801

DATE 12/22 19 85

| | | |
|---|---|---|
| CASH | | |
| | 3264 | 02 |
| | | |
| | | |
| | | |
| TOTAL | 3264 | 02 |
| | | |
| NET DEPOSIT | 3264 | 02 |

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

70 111 4



121

Western Suppliers Corporation
118 Malone Avenue
Sikeston, Missouri 63801

TELLER
117

December 20 19 85

$ 101.60

Pay to the order of Colonial Federal

one hundred one and 60/100 Dollars

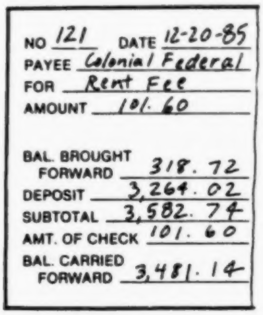
Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo Rent Fee
Acct. 20311

Carolyn Mae Merrick

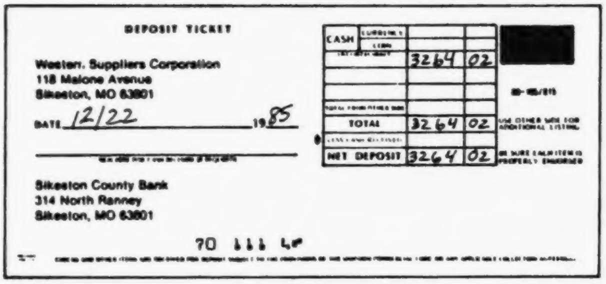
70 111 4 144

10. Compare each slip with the check stubs or check register.



NO 121 DATE 12-20-85
PAYEE Colonial Federal
FOR Rent Fee
AMOUNT 101.60

BAL. BROUGHT FORWARD 318.72
DEPOSIT 3,264.02
SUBTOTAL 3,582.74
AMT. OF CHECK 101.60
BAL. CARRIED FORWARD 3,481.14



DEPOSIT TICKET

Western Suppliers Corporation
118 Malone Avenue
Sikeston, MO 63801

DATE 12/22 19 85

| | | |
|---|---|---|
| CASH | | |
| | 3264 | 02 |
| | | |
| | | |
| | | |
| TOTAL | 3264 | 02 |
| | | |
| NET DEPOSIT | 3264 | 02 |

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

70 111 4

11. Place a check mark on the check stub or check register for each matching slip.

NO 121 DATE 12-20-85
PAYEE Colonial Federal
FOR Rent Fee
AMOUNT 101.60

BAL. BROUGHT FORWARD 318.72
DEPOSIT ✓ 3,264.02
SUBTOTAL 3,582.74
AMT. OF CHECK 101.60
BAL. CARRIED FORWARD 3,481.14

12. Search the check stubs or check register for any additional deposits.

NO ____ DATE ____
PAYEE ____
FOR ____
AMOUNT ____

BAL. BROUGHT FORWARD 1,566.24
DEPOSIT 4,501.00
service charges 15.00
AMT. OF CHECK 209.09
BAL. CARRIED FORWARD 5,843.15

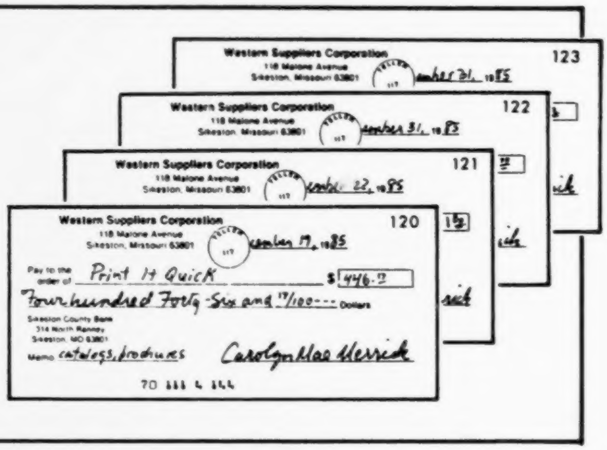
13. For each deposit that does not have a check mark, enter the amount on the reconcilement form in the space entitled "Add Deposits Not on the Statement."

Balance Shown on Bank Statement $ 1,777.08
Add Deposits Not on Statement $ 4,501.00
____
____
____
Subtotal $ ____

14. Add the "Balance Shown on Bank Statement" to the deposits and enter a Subtotal.

| | |
|---|---|
| **Balance Shown on Bank Statement** | $ 1,777.08 |
| **Add Deposits Not on Statement** | $ 4,501.00 |
| | |
| | |
| | |
| **Subtotal** | $ 6,278.08 |

15. Pick up the cancelled checks again and arrange them in numerical order.



Western Suppliers Corporation
118 Malone Avenue
Sikeston, Missouri 63801
TELLER 117
ember 31, 19 85
123

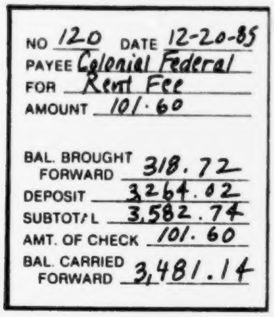
Western Suppliers Corporation
118 Malone Avenue
Sikeston, Missouri 63801
TELLER 117
ember 31, 19 85
122

Western Suppliers Corporation
118 Malone Avenue
Sikeston, Missouri 63801
TELLER 117
ember 22, 19 85
121

Western Suppliers Corporation
118 Malone Avenue
Sikeston, Missouri 63801
TELLER 117
ember 19, 19 85
120

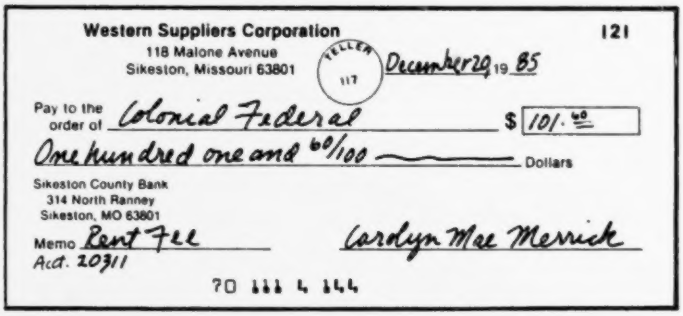
Pay to the order of Print It Quick $ 446.17
Four hundred Forty-Six and 17/100--- Dollars
Sikeston County Bank
314 North Ranney
Sikeston, MO 63801
Memo catalogs, brochures
Carolyn Mae Merrick
70 111 4 144

16. Compare the checks individually with the check stubs or check register to be certain that the amounts are identical.



NO 120 DATE 12-20-85
PAYEE Colonial Federal
FOR Rent Fee
AMOUNT 101.60

BAL. BROUGHT FORWARD 318.72
DEPOSIT 3264.02
SUBTOTAL 3,582.74
AMT. OF CHECK 101.60
BAL. CARRIED FORWARD 3,481.14

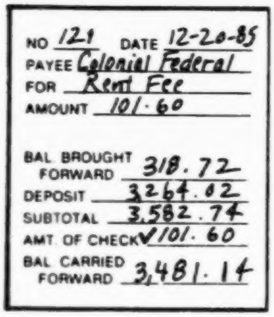


Western Suppliers Corporation
118 Malone Avenue
Sikeston, Missouri 63801
TELLER 117
December 20 19 85
121

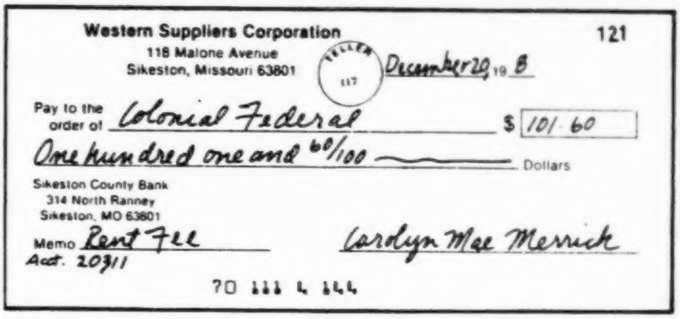
Pay to the order of Colonial Federal $ 101.60
One hundred one and 60/100 ——— Dollars
Sikeston County Bank
314 North Ranney
Sikeston, MO 63801
Memo Rent Fee
Acct. 20311
Carolyn Mae Merrick
70 111 4 144

17. Place a check mark on the check stub or check register if the cancelled check has been cleared by the bank.

→



| | |
|---|---|
| NO | 121 |
| DATE | 12-20-85 |
| PAYEE | Colonial Federal |
| FOR | Rent Fee |
| AMOUNT | 101.60 |
| BAL. BROUGHT FORWARD | 318.72 |
| DEPOSIT | 3264.02 |
| SUBTOTAL | 3,582.74 |
| AMT. OF CHECK | ✓101.60 |
| BAL. CARRIED FORWARD | 3,481.14 |



**Western Suppliers Corporation**
118 Malone Avenue
Sikeston, Missouri 63801

121

TELLER 117

December 20, 19 85

Pay to the order of Colonial Federal $ 101.60

One hundred one and 60/100 Dollars

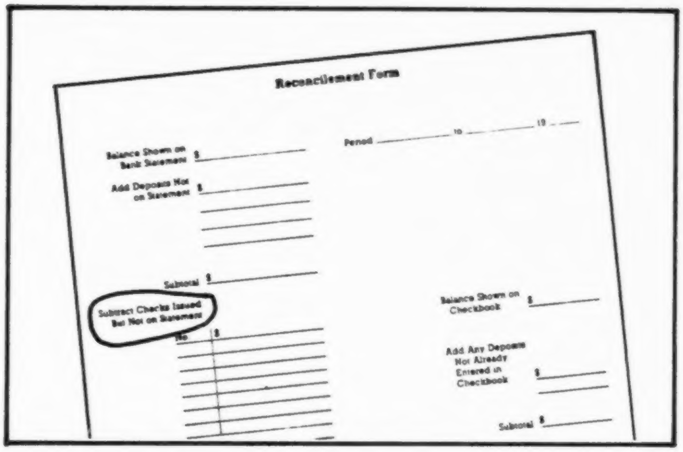
Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo Rent Fee
Acct. 20311

Carolyn Mae Merrick

70 111 4 144

18. Locate the "Checks Issued But Not on Statement" column on the reconcilement form.



**Reconcilement Form**

Period ________ to ________ 19 ___

Balance Shown on Bank Statement $ ________

Add Deposits Not on Statement $ ________

Subtotal $ ________

Subtract Checks Issued But Not on Statement

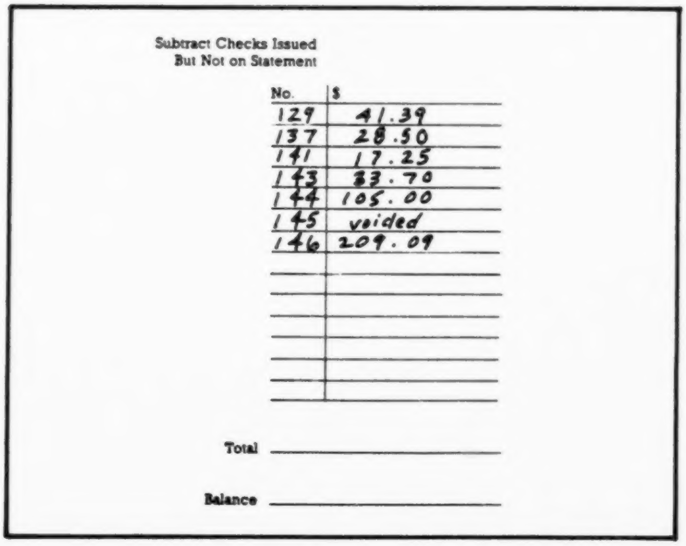
No. | $

Balance Shown on Checkbook $ ________

Add Any Deposits Not Already Entered in Checkbook $ ________

Subtotal $ ________

19. For each check that does not have a check mark, enter the number of the check and the amount of the check in the "Checks Issued But Not on Statement" column.



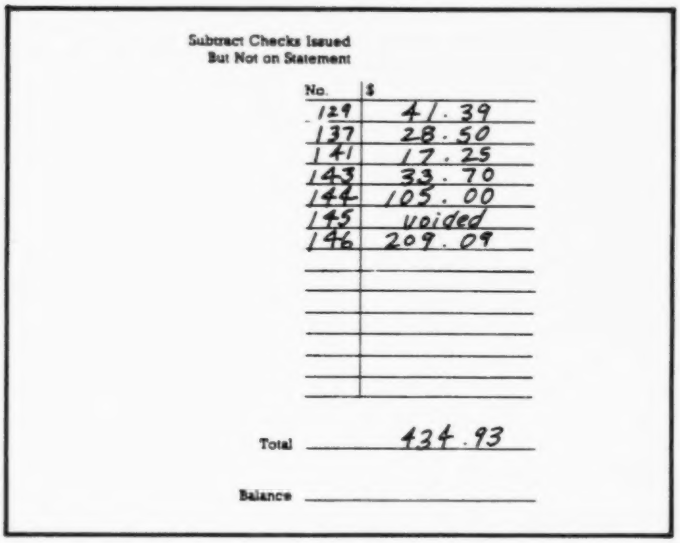
Subtract Checks Issued
But Not on Statement

| No. | $ |
|---|---|
| 129 | 41.39 |
| 137 | 28.50 |
| 141 | 17.25 |
| 143 | 83.70 |
| 144 | 105.00 |
| 145 | voided |
| 146 | 209.09 |

Total ________

Balance ________

20. Determine the total value of the "Check Issued But Not on Statement" column.



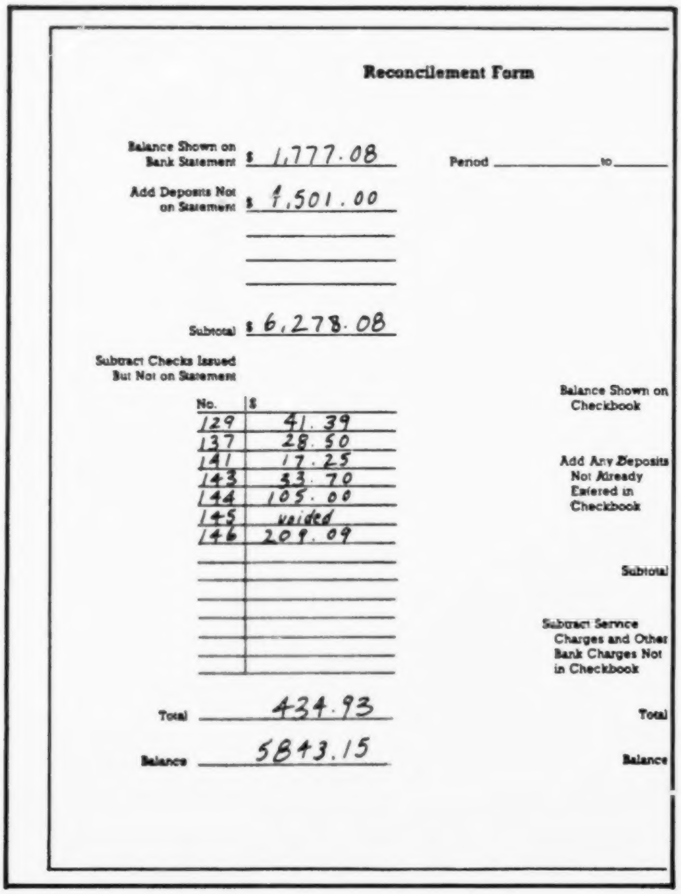
Subtract Checks Issued
But Not on Statement

| No. | $ |
|---|---|
| 129 | 41.39 |
| 137 | 28.50 |
| 141 | 17.25 |
| 143 | 33.70 |
| 144 | 105.00 |
| 145 | voided |
| 146 | 209.09 |

Total 434.93

Balance

21. Subtract the checks from the Subtotal to determine the corrected bank balance.



**Reconcilement Form**

Balance Shown on Bank Statement $ 1,777.08

Period ________ to ______

Add Deposits Not on Statement $ 4,501.00

Subtotal $ 6,278.08

Subtract Checks Issued
But Not on Statement

| No. | $ |
|---|---|
| 129 | 41.39 |
| 137 | 28.50 |
| 141 | 17.25 |
| 143 | 33.70 |
| 144 | 105.00 |
| 145 | voided |
| 146 | 209.09 |

Total 434.93

Balance 5843.15

Balance Shown on Checkbook

Add Any Deposits Not Already Entered in Checkbook

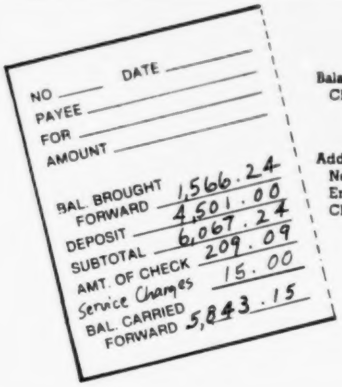
Subtotal

Subtract Service Charges and Other Bank Charges Not in Checkbook

Total

Balance

22. Enter the ending balance from the checkbook.



NO ____ DATE ____
PAYEE ____
FOR ____
AMOUNT ____
BAL. BROUGHT FORWARD 1,566.24
DEPOSIT 4,501.00
SUBTOTAL 6,067.24
AMT. OF CHECK 209.09
Service Charges 15.00
BAL. CARRIED FORWARD 5,843.15

Balance Shown on Checkbook $ 5,842.15

Add Any Deposits Not Already Entered in Checkbook $ ____

Subtotal $ ____

23. Compare the ending balance of the checkbook with the corrected bank balance. The amounts should be the same.

**Reconcilement Form**

Balance Shown on Bank Statement $ 1,777.08

Period ____ to ____ 19 ____

Add Deposits Not on Statement $ 4,500.00

Subtotal $ 6,277.08

Subtract Checks Issued But Not on Statement

| No. | $ |
|---|---|
| 129 | 41.39 |
| 137 | 28.50 |
| 141 | 17.25 |
| 143 | 33.70 |
| 144 | 105.00 |
| 145 | voided |
| 146 | 209.09 |
| | |
| | |
| | |
| | |
| | |
| | |

Total 434.93

Balance 5843.15

Balance Shown on Checkbook $ 5,843.15

Add Any Deposits Not Already Entered in Checkbook $ ____

Subtotal $ ____

Subtract Service Charges and Other Bank Charges Not in Checkbook $ ____

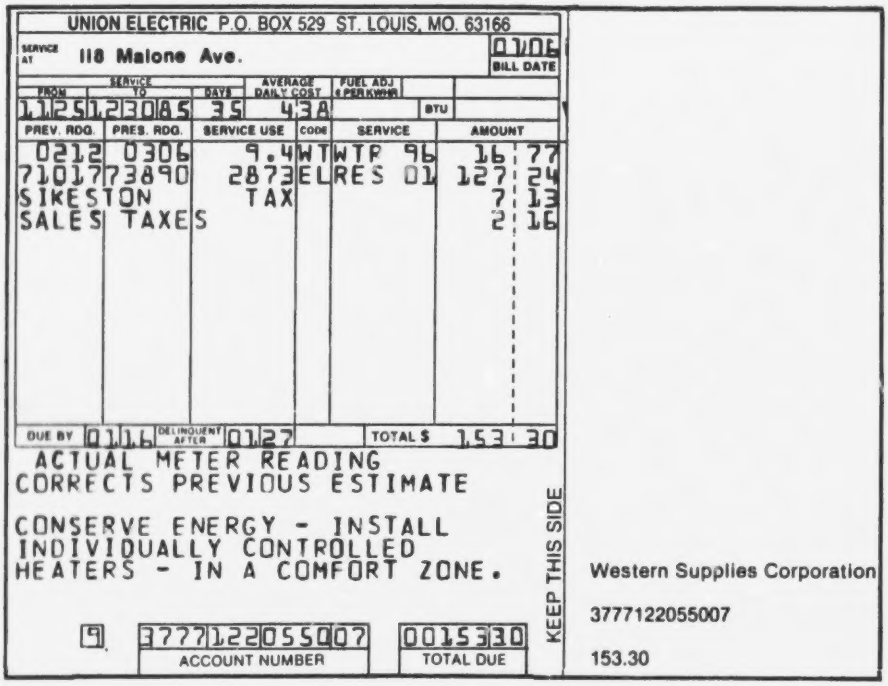
Total $ ____

Balance $ ____

# Banking
# Unit Review

**Directions:** Answer the following questions using the blanks or forms provided.

1. Study the bill shown here and enter the data requested.



UNION ELECTRIC P.O. BOX 529 ST. LOUIS, MO. 63166

SERVICE AT **118 Malone Ave.**

BILL DATE 0106

| SERVICE FROM | SERVICE TO | DAYS | AVERAGE DAILY COST | FUEL ADJ ¢ PER KWHR | BTU |
|---|---|---|---|---|---|
| 1125 | 123085 | 35 | 4.38 | | |

| PREV. RDG. | PRES. RDG. | SERVICE USE | CODE | SERVICE | AMOUNT |
|---|---|---|---|---|---|
| 0212 | 0306 | 9.4 | WT | WTR 96 | 16.77 |
| 71017 | 73890 | 2873 | EL | RES 01 | 127.24 |
| SIKESTON | | TAX | | | 7.13 |
| SALES | TAXES | | | | 2.16 |

DUE BY 0116 DELINQUENT AFTER 0127 TOTAL $ 153.30

ACTUAL METER READING
CORRECTS PREVIOUS ESTIMATE

CONSERVE ENERGY - INSTALL
INDIVIDUALLY CONTROLLED
HEATERS - IN A COMFORT ZONE.

9 3777122055007 ACCOUNT NUMBER 0015330 TOTAL DUE

KEEP THIS SIDE

Western Supplies Corporation

3777122055007

153.30

a. The due date is: ____________________

b. The minimum payment due is: ____________________

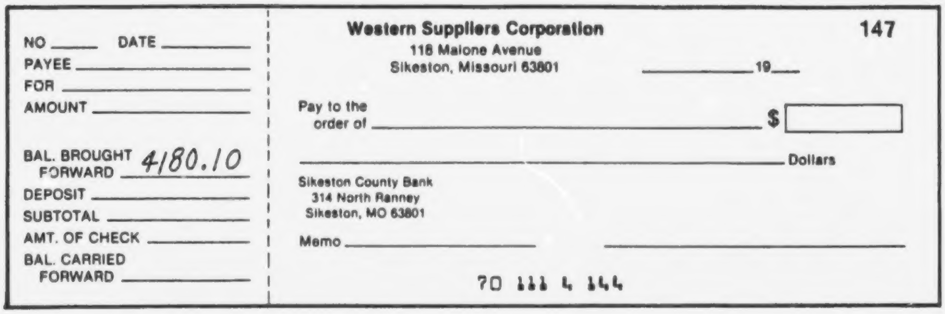
c. The account number is: ____________________

d. The billing date is: ____________________

2. Prepare a tickler card for the bill in Question 1.

300

3. Prepare the check stub and check for the bill in Question 1. Use check Number 147 and January 13 as the date.



NO _____ DATE __________
PAYEE __________
FOR __________
AMOUNT __________

BAL. BROUGHT FORWARD 4180.10
DEPOSIT __________
SUBTOTAL __________
AMT. OF CHECK __________
BAL. CARRIED FORWARD __________

**Western Suppliers Corporation**
118 Malone Avenue
Sikeston, Missouri 63801

147

__________ 19___

Pay to the order of __________ $ ☐

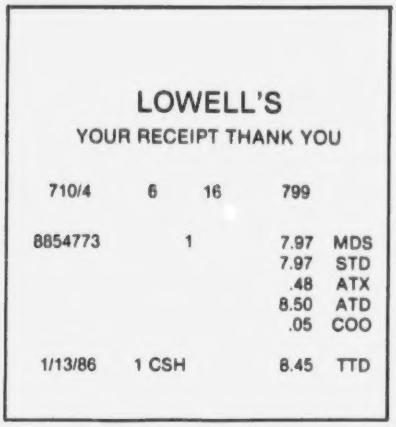
__________ Dollars

Sikeston County Bank
314 North Ranney
Sikeston, MO 63801

Memo __________ __________

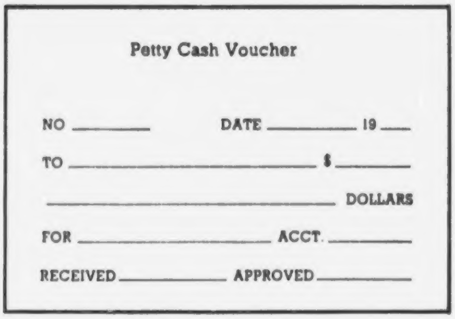
70 111 4 144

4. The following receipt was presented by Ms. Western for a new diskette file.
   a. Prepare the petty cash voucher. Use No. 122 and January 13 as the date. . The account number is 3109.



LOWELL'S
YOUR RECEIPT THANK YOU

| | | | | |
|---|---|---|---|---|
| 710/4 | 6 | 16 | 799 | |
| 8854773 | 1 | | 7.97 | MDS |
| | | | 7.97 | STD |
| | | | .48 | ATX |
| | | | 8.50 | ATD |
| | | | .05 | COO |
| 1/13/86 | 1 CSH | | 8.45 | TTD |



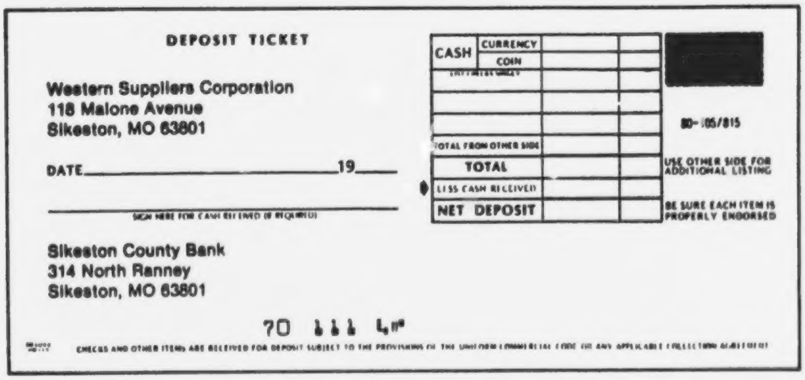
Petty Cash Voucher

NO _______ DATE _______ 19___
TO __________ $ _______
__________ DOLLARS
FOR __________ ACCT. _______
RECEIVED _______ APPROVED _______

   b. Indicate how the change would be prepared.

How many $10s? _____
$5s? _____
$1s? _____
quarters? _____
dimes? _____
nickels? _____
pennies? _____

5. In today's mail, you receive three checks. Prepare a deposit slip. The checks are for $234.18, $60.59, and $98.33.



**DEPOSIT TICKET**

**Western Suppliers Corporation**
**118 Malone Avenue**
**Sikeston, MO 63801**

DATE________________________19____

______________________________________
SIGN HERE FOR CASH RECEIVED (IF REQUIRED)

**Sikeston County Bank**
**314 North Ranney**
**Sikeston, MO 63801**

| | | | |
|---|---|---|---|
| CASH | CURRENCY | | |
| | COIN | | |
| LIST CHECKS SINGLY | | | |
| | | | |
| | | | |
| TOTAL FROM OTHER SIDE | | | |
| TOTAL | | | |
| LESS CASH RECEIVED | | | |
| NET DEPOSIT | | | |

[redacted]

80-105/815

USE OTHER SIDE FOR ADDITIONAL LISTING

BE SURE EACH ITEM IS PROPERLY ENDORSED

70 ⑆⑆⑆ 4⑈

CHECKS AND OTHER ITEMS ARE RECEIVED FOR DEPOSIT SUBJECT TO THE PROVISIONS OF THE UNIFORM COMMERCIAL CODE OR ANY APPLICABLE COLLECTION AGREEMENT

# Banking
# Performance Checklist

Student ______________________________ has successfully performed the following steps of procedure.

| Organized Payments | Yes | No | Comments |
|---|---|---|---|
| 1. Identified and assembled equipment | | | |
| 2. Opened incoming bills | | | |
| 3. Determined due date | | | |
| 4. Prepared a tickler card if due date was more than 5 days away | | | |
| 5. Checked the tickler at the beginning of each work day | | | |
| 6. Used procedures manual to determine whether to prepare a check or petty cash voucher | | | |

| Paid Bills by Check | Yes | No | Comments |
|---|---|---|---|
| 1. Prepared check stubs | | | |
| 2. Prepared checks | | | |
| 3. Secured authorized check number | | | |
| 4. Correctly placed check and return portion of statement in the return envelope | | | |
| 5. Wrote or typed a return address | | | |

| Paid Bills with Petty Cash | Yes | No | Comments |
|---|---|---|---|
| 1. Prepared petty cash voucher | | | |
| 2. Secured an authorized signature for the petty cash voucher | | | |
| 3. Counted change to give to payee | | | |
| 4. Secured payee's signature | | | |

| Performed Banking Activities | Yes | No | Comments |
|---|---|---|---|
| 1. Completed a deposit slip: | | | |
| sorted currency into denominations | | | |
| entered the value of the currency | | | |
| sorted coins into quarters, dimes, nickels, and pennies | | | |
| endorsed each check | | | |
| entered checks singly | | | |
| identified each check by bank name or code number | | | |
| determined the total of the deposit slip | | | |
| supplied the date of the deposit | | | |
| entered the deposit in the check stubs or register | | | |
| 2. Reconciled a bank statement: | | | |
| deducted service charges from checkbook balance | | | |
| entered the ending balance from the bank statement on the reconcilement form | | | |
| sorted deposit slips and cancelled checks | | | |
| compared the deposit slips with the check stubs or register | | | |
| entered the amounts of outstanding deposits on the reconcilement | | | |
| added outstanding deposits to ending balance | | | |
| entered a subtotal | | | |
| arranged cancelled checks in numerical order | | | |
| compared the cancelled checks with the check stubs or register | | | |
| entered amounts of outstanding checks on the reconcilement form | | | |
| totalled outstanding checks | | | |
| deducted outstanding checks from the subtotal and entered the corrected balance | | | |
| compared corrected bank balance to checkbook balance | | | |

Satisfactory - Should Move On ☐
Repeat This Unit ☐

______________________ Student Signature/Date

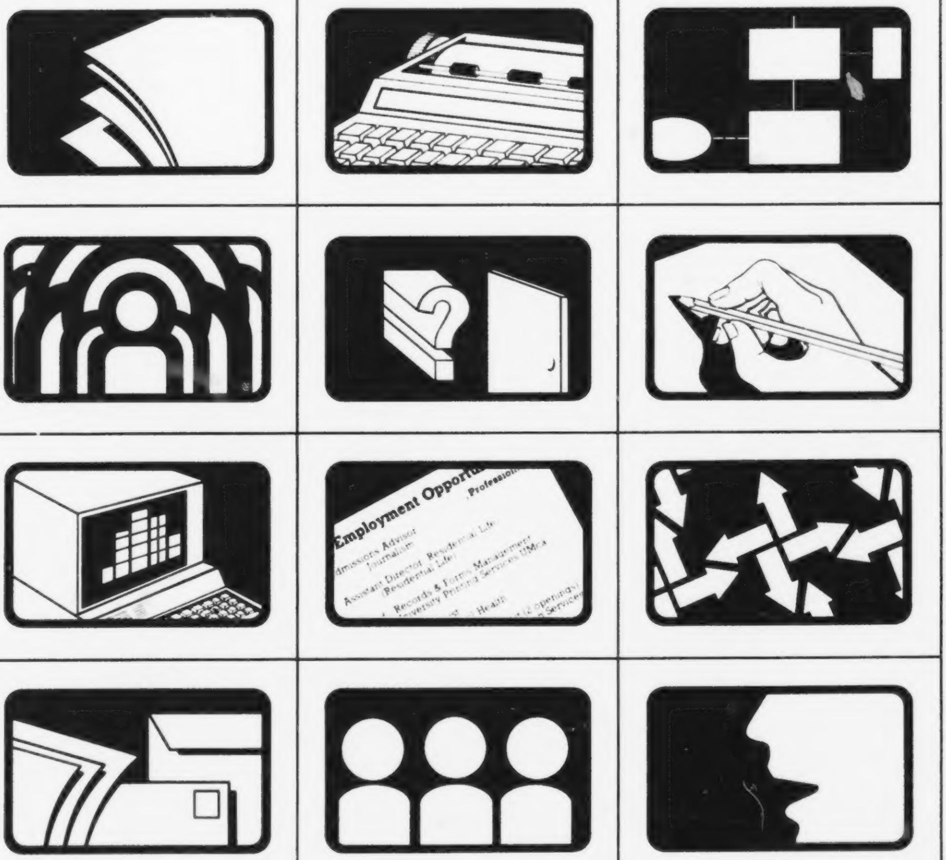
______________________ Instructor Signature/Date

SN-92-S

SUPPLEMENTARY UNITS FOR
SECRETARIAL TECHNOLOGY / OFFICE TECHNOLOGY

# Incoming Mail

## Unit 8



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## Incoming Mail
# Introduction

Since more mail is sent each year, office personnel who answer incoming mail more and more need the help of other office workers. Clerical/secretarial workers are needed to open the mail, time stamp the mail, attach enclosures, and prioritize incoming mail.

This unit shows you equipment, supplies, and step-by-step procedures for handling the mail which is received by a business.

---

## Unit Objective

After completion of this unit, you should be able to demonstrate procedures for handling business mail.

## Specific Objectives

After completion of this unit you should be able to:

1. Demonstrate how to open business correspondence.
2. Demonstrate how to attach enclosures.
3. Decide when to attach envelopes.
4. Decide when to write an entry in the mail register.
5. List the priority of business correspondence.

---

## Are You Ready?

Check the statement which is true for you.

☐ **I want to study the information in this unit before doing the Performance Checklist.**

**TURN THE PAGE AND BEGIN**

☐ **I can do the tasks and I am ready to do the Performance Checklist.**

**SEE YOUR INSTRUCTOR**

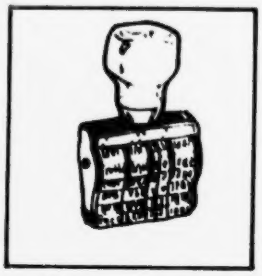
## A. Terms and Equipment Needed for Processing Incoming Mail

### Terms

1. Correspondence - letters or other items which circulate through the mail
2. Enclosure - an item, such as printed material, inserted in an envelope or package along with a letter
3. Enclosure Notation - the word "Enclosure" which is typed under the reference initials on a letter to show that an enclosure is being sent with the correspondence
4. Mailing Notation - words such as "Registered" or "Confidential" which appear on the envelope below the return address and on the stationery below the date line
5. Mail Register - a form used in recording information about incoming mail whenever:
    - An enclosure notation was typed but no enclosure can be found
    - The correspondence was sent byCertified, Registered, Insured, or other special delivery mail services
    - A shipment, which is mentioned in the letter, is being sent separately
6. Postmark - the date stamped on the envelope when the postage is stamped by postage meter, or the date stamped on the envelope by the post office
7. Priority - order or rank of importance with the highest priority or rank being the most important or urgent
8. Return Address - the address of the sender which may be found in the upper left hand corner of the envelope. The sender's address is also shown in the letterhead.

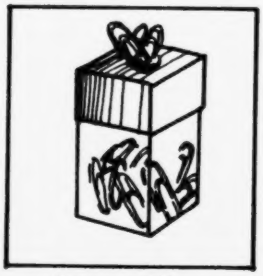
## Equipment and Supplies

Letter Opener



Date Stamp

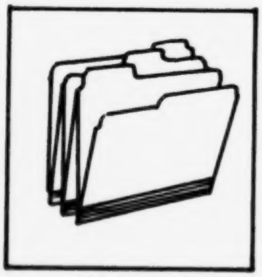
Pen



Paper Clips

Mail Register

Tape



Folders

## B. Steps for Opening Incoming Mail

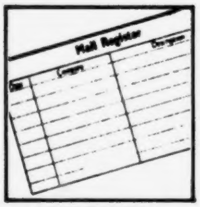
1. Clear your work area and assemble necessary equipment and supplies.

Letter Opener

Date Stamp

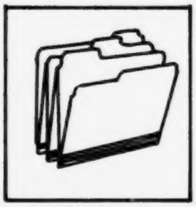
Pen

Paper Clips



Mail Register

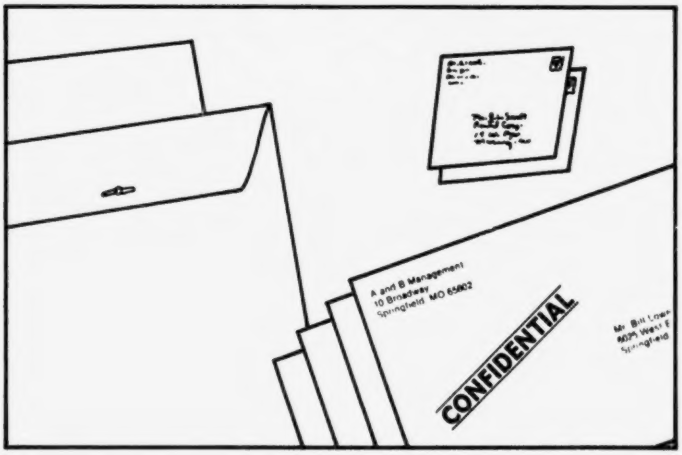
Tape



Folders

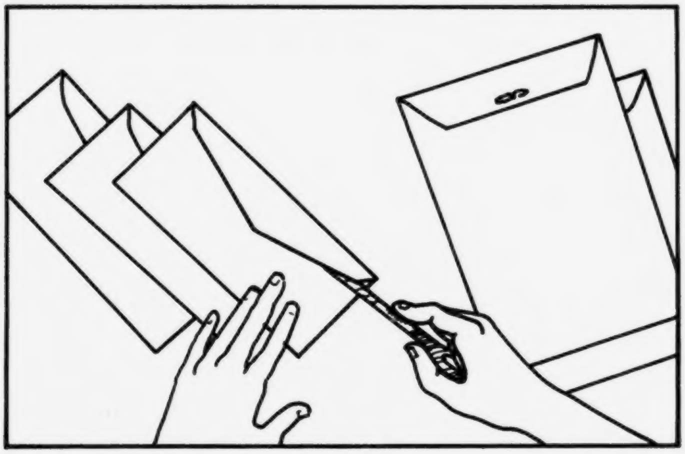
2. Sort and stack mail according to size.

**CAUTION!**
**Do not open envelopes marked "Confidential" or "Personal." These envelopes are delivered unopened to the person to whom they are addressed.**



3. Turn envelopes face down.

4. Open the envelopes by inserting a letter opener under the flaps of the envelopes or by loosening the clamps on manila envelopes.

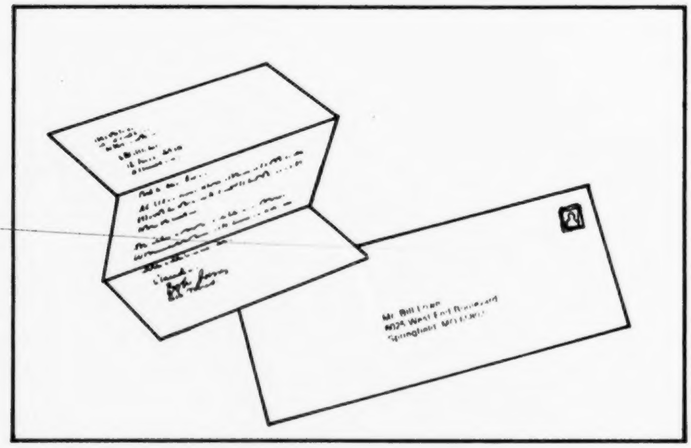


## C. Steps for Handling Incoming Mail

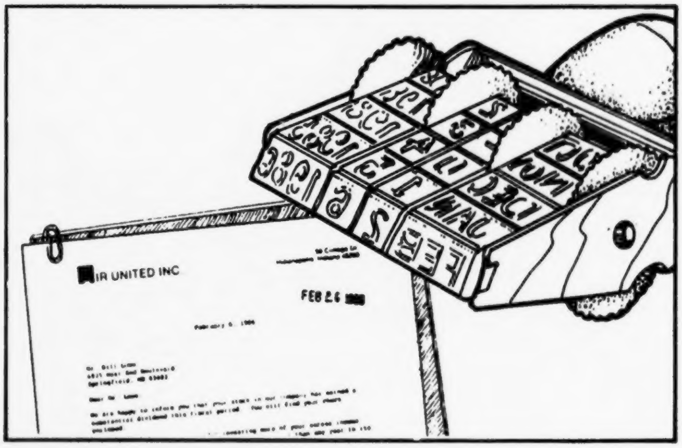
1. Pull out the contents of only one envelope at a time.
2. Unfold the letter.

**NOTE:**

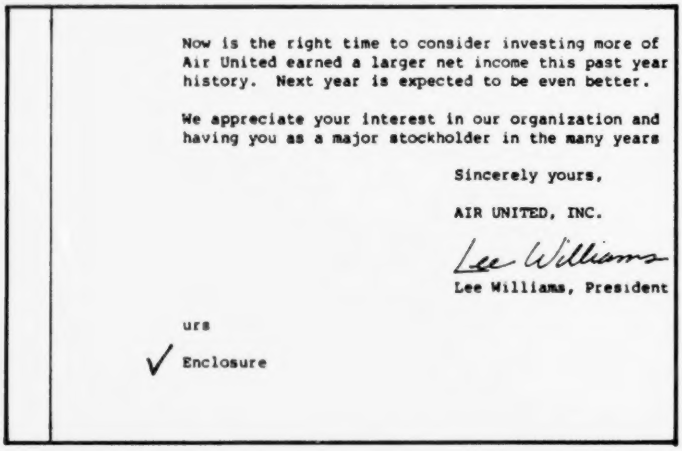
**Use transparent tape to mend a letter if it was torn when the envelope was opened.**



3. Set the date on the date stamp for the current date. Stamp the piece of correspondence with the date.



4. Look for enclosures and enclosure notations.
5. Place a check mark ( ✓ ) to the left of the enclosure notation when the enclosure has been included in the correspondence.



Now is the right time to consider investing more of
Air United earned a larger net income this past year
history. Next year is expected to be even better.

We appreciate your interest in our organization and
having you as a major stockholder in the many years

Sincerely yours,

AIR UNITED, INC.

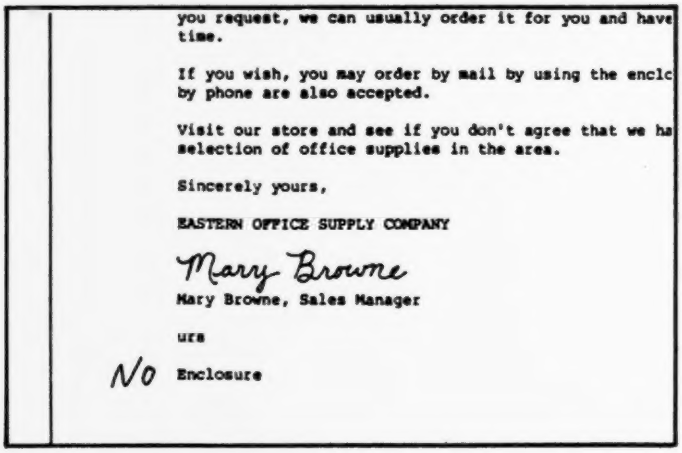
Lee Williams

Lee Williams, President

urs

✓ Enclosure

6. Write "No" in the margin to the left of the enclosure notation if the enclosure was not sent.



you request, we can usually order it for you and have
time.

If you wish, you may order by mail by using the encl
by phone are also accepted.

Visit our store and see if you don't agree that we ha
selection of office supplies in the area.

Sincerely yours,

EASTERN OFFICE SUPPLY COMPANY

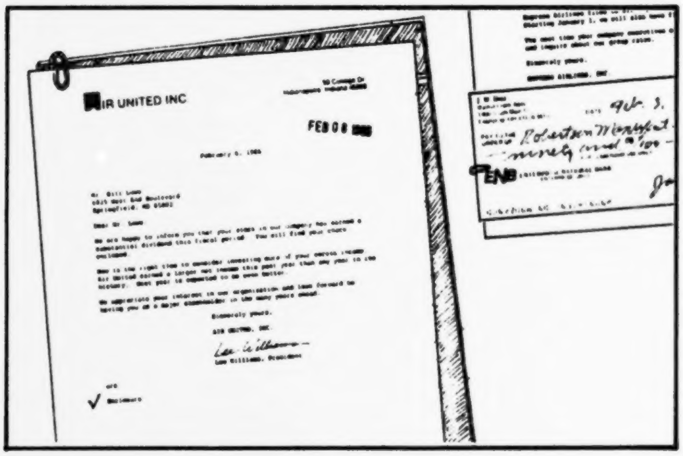
Mary Browne

Mary Browne, Sales Manager

urs

No Enclosure

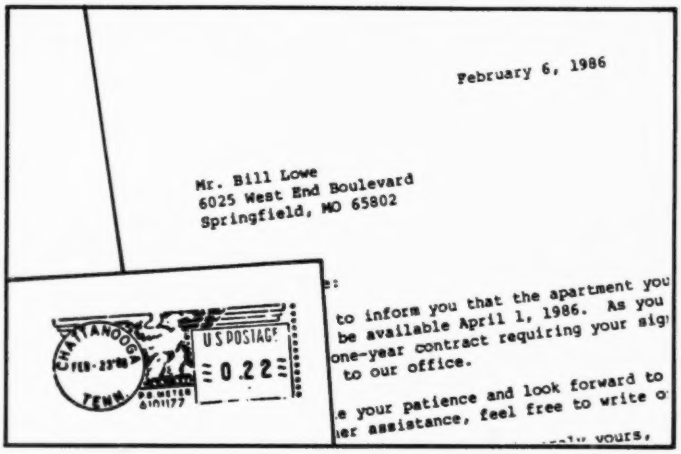
7. Clip large enclosures to the back of the correspondence. Clip small enclosures such as checks to the front of the correspondence.



## D. Guidelines for Deciding when to Save Envelopes

Attach envelopes to the correspondence when:

1. There is a difference of ten days or more between the date typed on the dateline on the letter and the date in the postmark.



February 6, 1986

Mr. Bill Lowe
6025 West End Boulevard
Springfield, MO 65802

e:

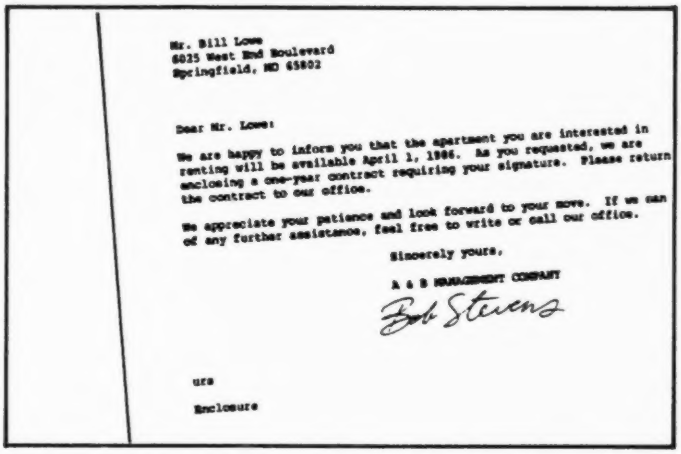
to inform you that the apartment you
be available April 1, 1986. As you
one-year contract requiring your sig
to our office.

e your patience and look forward to
er assistance, feel free to write o

yours,

CHATTANOOGA
FEB-23'86
TENN.
U S POSTAGE
0.22
PB METER
6101177

2. There is no typed name of the sender.
3. A legal document, such as a contract, is enclosed.



Mr. Bill Lowe
6025 West End Boulevard
Springfield, MO 65802

Dear Mr. Lowe:

We are happy to inform you that the apartment you are interested in renting will be available April 1, 1986. As you requested, we are enclosing a one-year contract requiring your signature. Please return the contract to our office.

We appreciate your patience and look forward to your move. If we can of any further assistance, feel free to write or call our office.

Sincerely yours,

A & B MANAGEMENT COMPANY

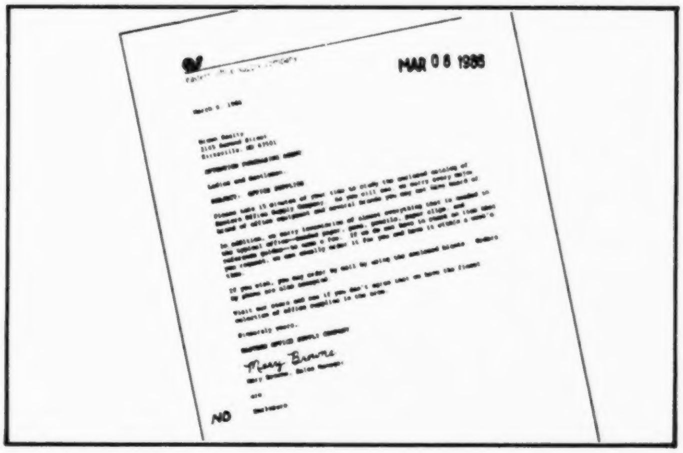
Bob Stevens

urs

Enclosure

4. There is no return address on the stationery.
5. An enclosure is missing.

**NOTE:** If in doubt, save the envelope.



MAR 0 6 1986

Mary Browne

ND

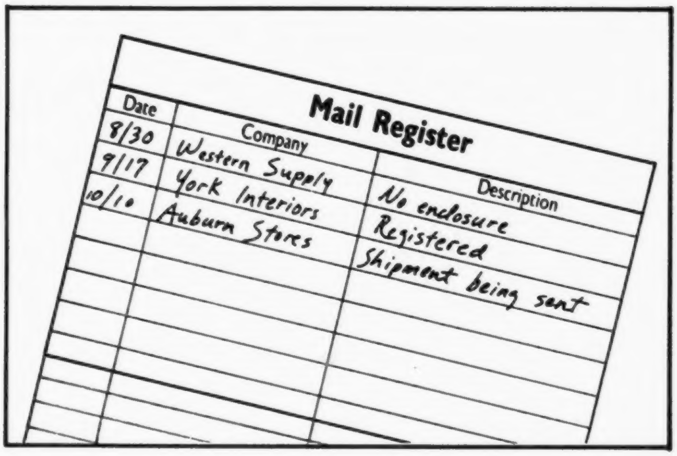
## E. Guidelines for Deciding when to Write an Entry in the Mail Register

1. Scan the contents of the letter for:

- special mailing notations
- comments about shipments being sent separately

2. Record the correspondence in the mail register when:

- an enclosure notation was typed but no enclosure can be found
- the correspondence was sent by Certified, Registered, Insured, or other special delivery mail services
- a shipment, which is mentioned in the letter, is being sent separately



**Mail Register**

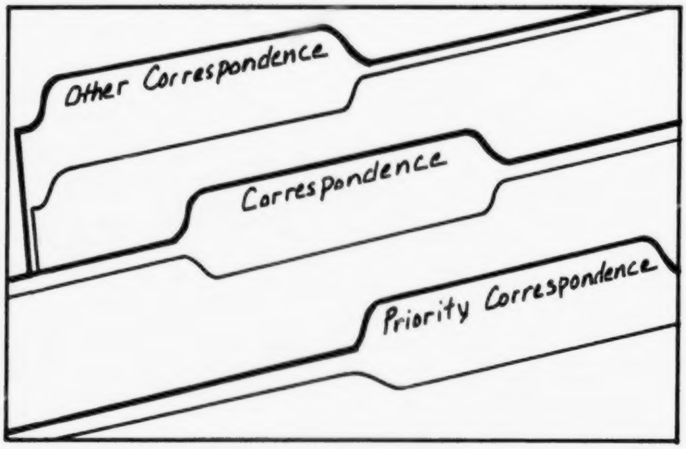
| Date | Company | Description |
|---|---|---|
| 8/30 | Western Supply | No enclosure |
| 9/17 | York Interiors | Registered |
| 10/10 | Auburn Stores | Shipment being sent |

## F. Steps for Prioritizing Mail

1. Place telegrams and letters marked "Confidential" or "Personal" in a folder labeled "Priority Correspondence."

2. Place letters, memos, and bills along with their attachments, if any, in a folder labeled "Correspondence."

3. Place newspapers, brochures, magazines, catalogs, and other correspondence in a folder labeled "Other Correspondence."



## DO SKILL SHEET 1

# Incoming Mail
# Skill Sheet 1

**Directions:** Answer the following questions.

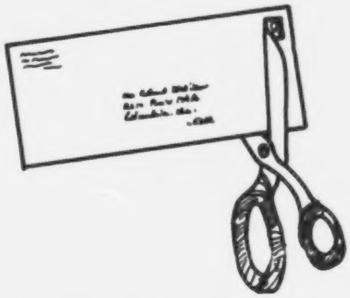
1. The postmark on the envelope is October 10. The date on the letter is October 10. Would you attach the envelope to the letter? ☐ YES ☐ NO
2. The postmark on the envelope is October 10. A Bill of Sale accompanies the letter. Would you attach the envelope to the letter? ☐ YES ☐ NO
3. The typist does not type the signer's name, but the signer signs the letter anyway. Would you attach the envelope to the letter? ☐ YES ☐ NO
4. The writer types the letter on plain paper and forgets to type the home address. Would you attach the envelope to the letter? ☐ YES ☐ NO
5. The sender forgets to send the enclosure. Would you attach the envelope to the letter? ☐ YES ☐ NO
6. The sender forgets to sign the letter which is dated October 10. The envelope is postmarked October 17. Would you attach the envelope to the letter? ☐ YES ☐ NO
7. The sender includes a Lease Agreement with the letter typed on plain paper. The sender's name is not typed on the letter. Would you attach the envelope to the letter? ☐ YES ☐ NO
8. The letter mentions a shipment to be sent. Would you register the letter? ☐ YES ☐ NO
9. The correspondence is a telegram. Would you register the telegram? ☐ YES ☐ NO
10. The memo mentions an attached report, but the report is not in the manila envelope. Would you register the correspondence? ☐ YES ☐ NO
11. The package is sent by Insured Mail. Would you register the package? ☐ YES ☐ NO

## Incoming Mail
# Unit Review

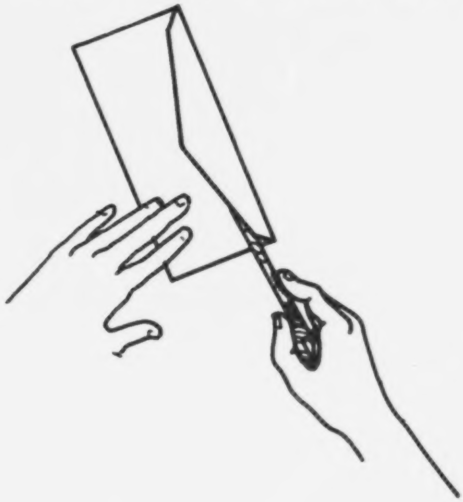
**Directions:** Circle the best answer for questions 1 through 5.

1. Which example shows the correct way to open business correspondence?

a.



b.



2. An example of a mailing notation is:
   a. "Registered"
   b. "Postmark"
   c. "Return Address"

3. The enclosure notation is typed in this location:
   a. between the date and address
   b. below the reference initials
   c. in the upper left corner of the envelope

4. Small enclosures are attached to correspondence
   a. by clipping them to the front of the letter
   b. by stapling them to the bottom of the letter
   c. by stapling them to the back of the letter

5. Which of the following examples does NOT need to be noted in a mail register?
   a. a letter sent by First-Class Mail
   b. a letter sent by Insured Mail
   c. a letter which indicated that a catalog was being sent
   d. a letter which indicated an enclosure but the enclosure was not found

6. List two examples of incoming mail that would be placed in a folder labeled "Correspondence."
   a. ______________________________
   b. ______________________________
   ______________________________

## Incoming Mail
# Performance Checklist

Student ______________________ has successfully performed the following steps of procedure.

| Incoming Mail Tasks | Yes | No | Comments |
|---|---|---|---|
| 1. Identified and assembled equipment | | | |
| 2. Sorted and stacked mail according to size | | | |
| 3. Did not open confidential or personal mail | | | |
| 4. Used letter opener to open letters | | | |
| 5. Inspected the contents of one envelope at a time | | | |
| 6. Unfolded the letter and inspected for any cuts | | | |
| 7. Checked the date on the date stamp | | | |
| 8. Stamped each piece of correspondence | | | |
| 9. Inspected correspondence and envelope for enclosures | | | |
| 10. Placed check mark next to enclosure notation | | | |
| 11. Wrote "no" when enclosure was not found | | | |
| 12. Clipped large enclosures to the back | | | |
| 13. Clipped small enclosures to the front | | | |
| 14. Attached envelopes to mail when appropriate | | | |
| 15. Registered mail when appropriate | | | |
| 8. Sorted mail in proper folder for delivery to correspondents | | | |

Satisfactory - Should Move On ☐
Repeat This Unit ☐

______________________ Student Signature/Date

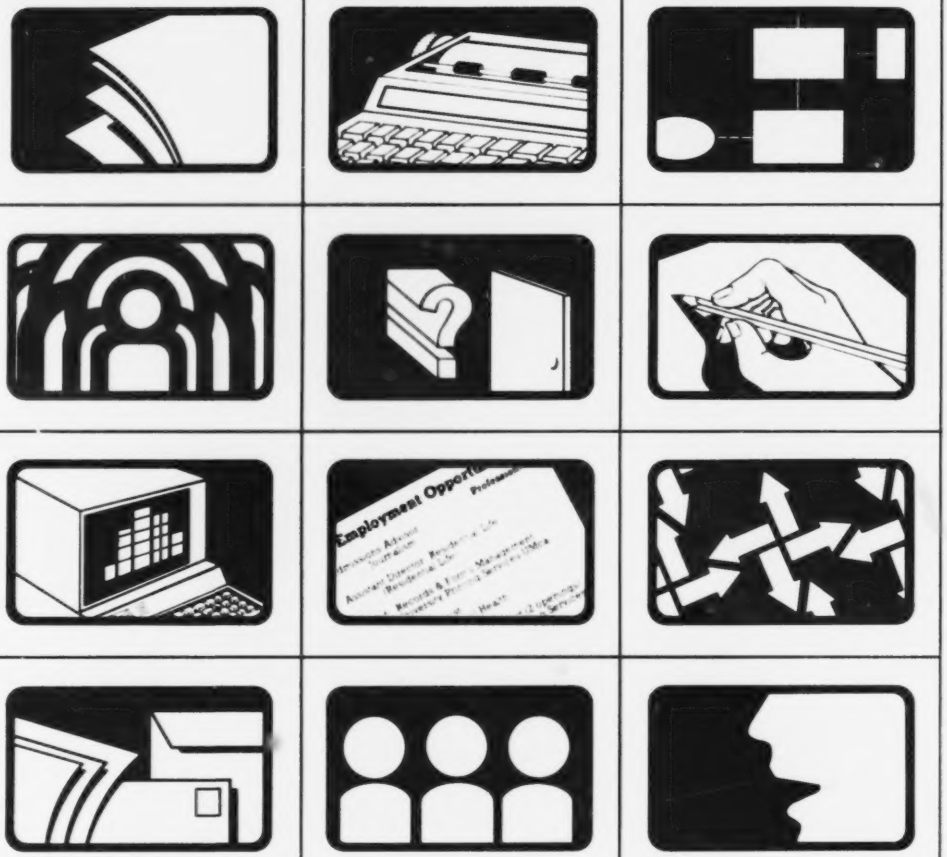
______________________ Instructor Signature/Date

SN-92-S

## SUPPLEMENTARY UNITS FOR SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

# Outgoing Mail

## Unit 9



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## Outgoing Mail
# Introduction

The average cost of a business letter is more than $8.50. Therefore, it is very important that clients and customers receive business correspondence in a timely manner. Secretarial/clerical employees can help insure that each piece of correspondence reaches its intended receiver by keeping accurate, up-to-date mailing lists of customers and by processing outgoing mail correctly.

This unit shows you how to use the Zip Code Directory and presents the supplies, equipment, and procedures for processing outgoing mail.

---

## Unit Objectives

After completion of this unit, you should be able to correctly process outgoing mail.

## Specific Objectives

After completion of this unit, you should be able to:

1. Select the appropriate envelope.
2. Correctly prepare envelope and correspondence for mailing.
3. Weigh and determine correct postage for First-Class Mail.
4. Use a Zip Code Directory.

---

## Are You Ready?

Check the statement which is true for you.

☐ I want to study the information in this unit before doing the Performance Checklist.

**TURN THE PAGE AND BEGIN**

☐ I can do the tasks and I am ready to do the Performance Checklist.

**SEE YOUR INSTRUCTOR**

## A. Terms and Equipment Needed for Processing Outgoing Mail

### Terms

1. Classes of mail - Outgoing mail may be sorted by classification. The amount of postage attached to the envelopes or packages depends upon the class of mail used and the weight of the item. For example:
    - First-Class Mail includes letters and post cards.
    - Second-Class Mail includes newspapers and magazines.
    - Third-Class Mail includes generally "advertising mail."
    - Fourth-Class Mail includes a package weighing one pound or more.

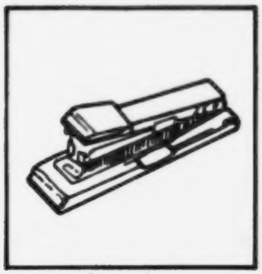
2. Mail services - Outgoing mail will receive special attention at the post office if the sender purchases services in addition to postage. Some commonly purchased mail services include Special Delivery, Insured Mail, Certificate of Mailing, Return Receipt, and Overnight Delivery.

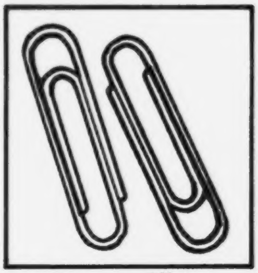
3. Postage - Stamps, a postage meter stamp, or a postage meter label (an adhesive strip) which is imprinted with a postage amount.

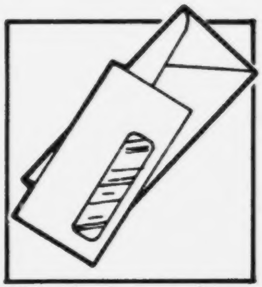
4. Rubber stamps - These devices are used for stamping words onto envelopes and packages.

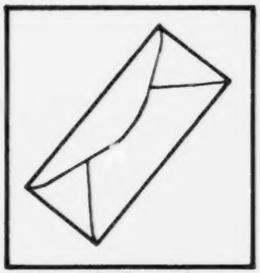
5. Zip Code directory - This book provides information about the Zip Code. The purpose of the Zip Code is to help the U.S. Post Office Department deliver mail more efficiently.

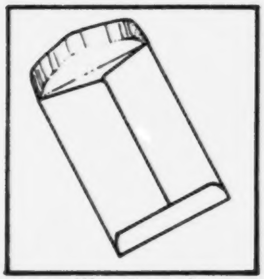
### Equipment


Stapler


Paper Clips

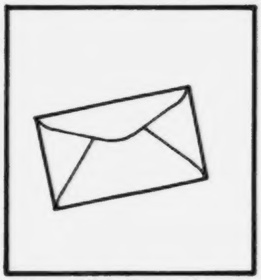

Window Envelope


No. 10 Envelope

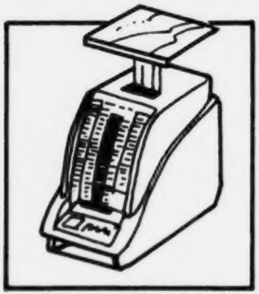

Manilla Envelope

Mailing Label

Stamps


No. 6¾ Envelope

Rubber Stamp and Ink Pad

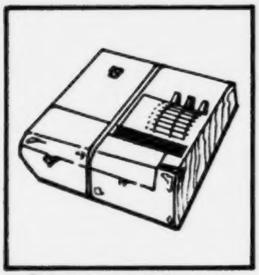


Postal Scales

Moisteners

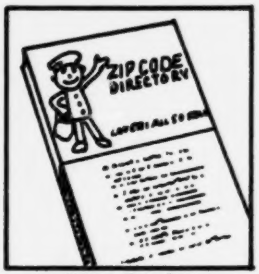
Stamp Dispenser

Postage Meter

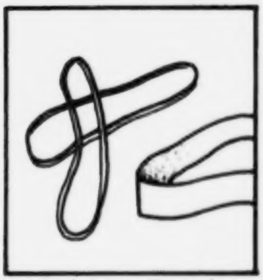


Postage Meter

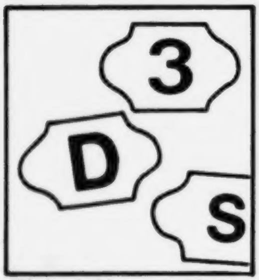
Mailing List



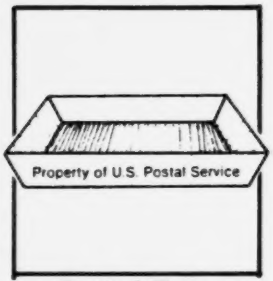
Zip Code Directory



Rubber Bands



Third-Class Labels

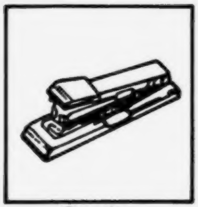

Property of U.S. Postal Service

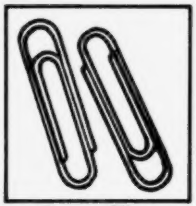
Postal Tray

## B. Steps for Preparing Envelopes

1. Clear work area.

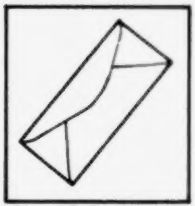
2. Assemble equipment.


Stapler

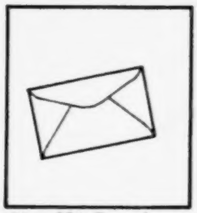

Paper Clips

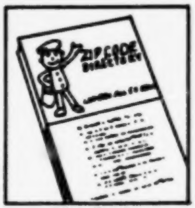
Mailing List

Window Envelope


No. 10 Envelope

Manilla Envelope


No. 6¾ Envelope

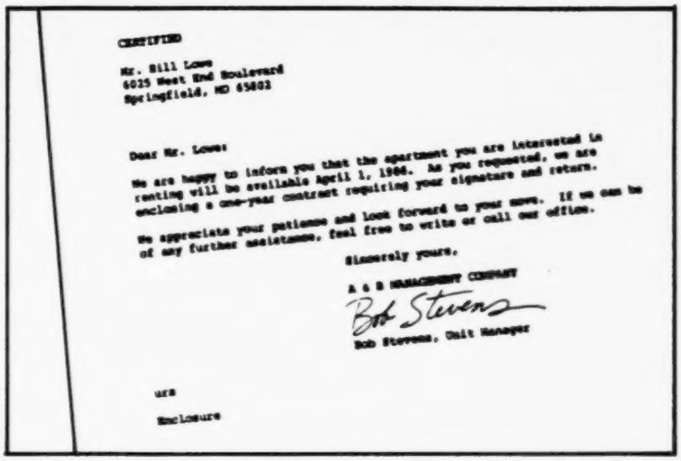


Zip Code Directory

Mailing Label

Rubber Stamp and Ink Pad

3. Scan the outgoing mail, which has been signed or initialed, for enclosure notations or mailing notations. (Also be certain that the appropriate number of carbon copies or photocopied copies have been made.)


CERTIFIED

Mr. Bill Lowe
6025 West End Boulevard
Springfield, MO 65802

Dear Mr. Lowe:

We are happy to inform you that the apartment you are interested in renting will be available April 1, 1986. As you requested, we are enclosing a one-year contract requiring your signature and return.

We appreciate your patience and look forward to your move. If we can be of any further assistance, feel free to write or call our office.

Sincerely yours,

A & B MANAGEMENT COMPANY

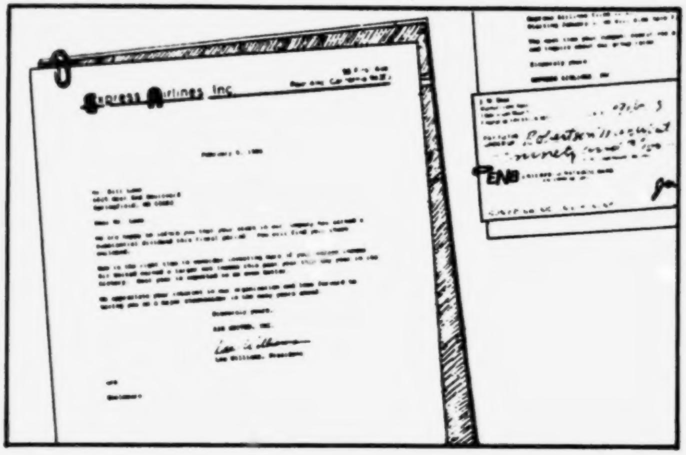
Bob Stevens

Bob Stevens, Unit Manager

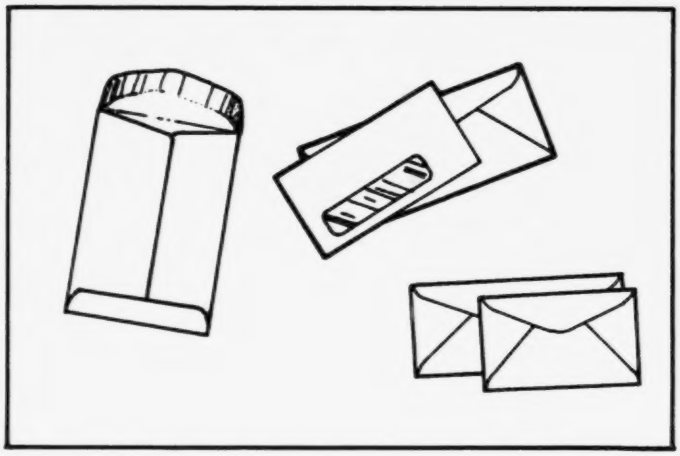
urs

Enclosure

4. Staple or paper clip small enclosures to the front of the correspondence.
5. Place other enclosures behind the correspondence.

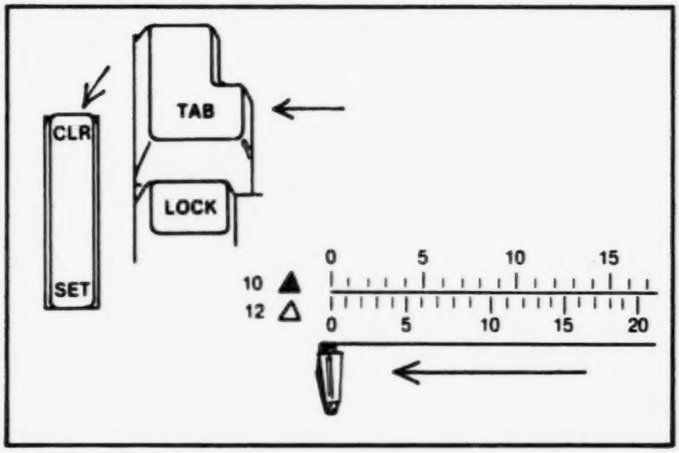

Express Airlines Inc.

6. Choose an appropriate envelope.

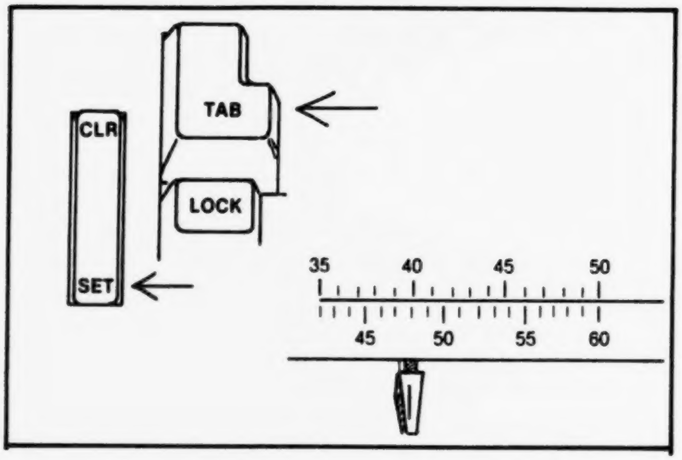


**To type a No. 10 envelope for outgoing mail. . .**

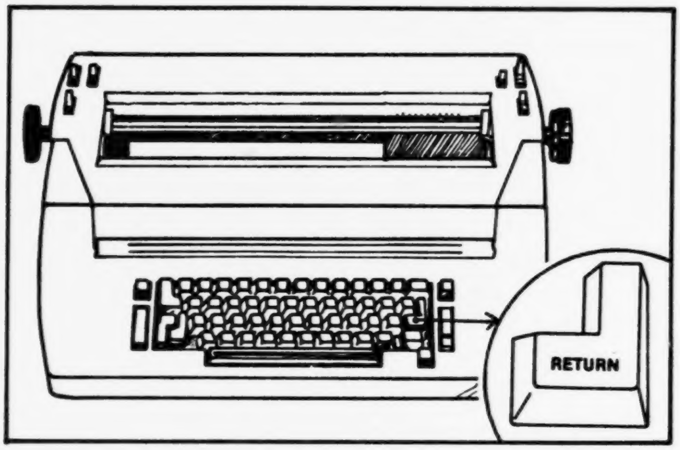
7. Prepare the typewriter by clearing all margins and tabs.



8. Set a tab stop at 50 if you are using an elite typewriter. (Set tab stop at 40 if you are using pica.)



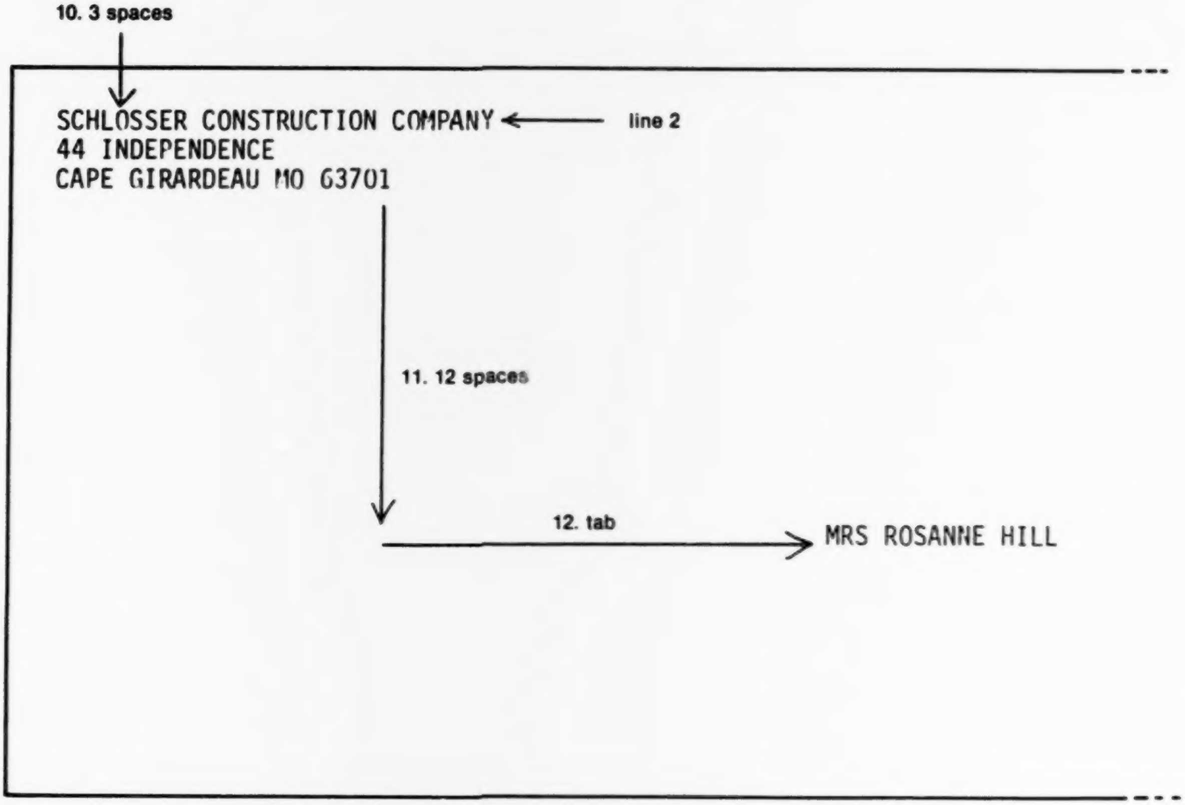
9. Insert the envelope into the typewriter and space down to line 2.



10. Space forward three spaces from the left edge. Type the sending company's name and address in block style. Use single spacing.

11. Return the carriage or "index" down 12 times.

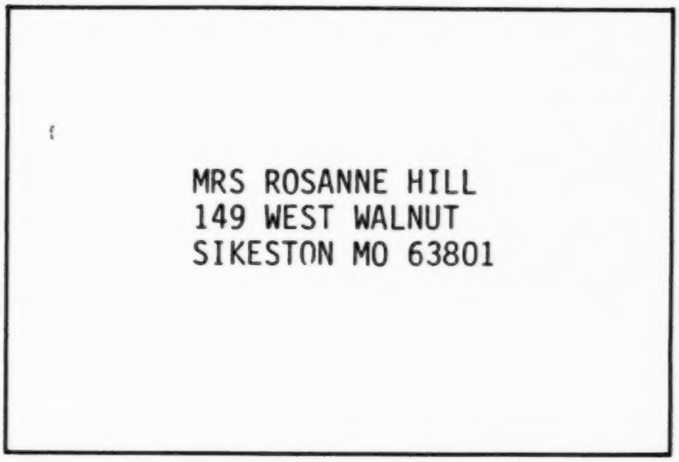
12. Tab over to 50 (or 40) and begin the first line of the receiver's address.



SCHLOSSER CONSTRUCTION COMPANY
44 INDEPENDENCE
CAPE GIRARDEAU MO 63701

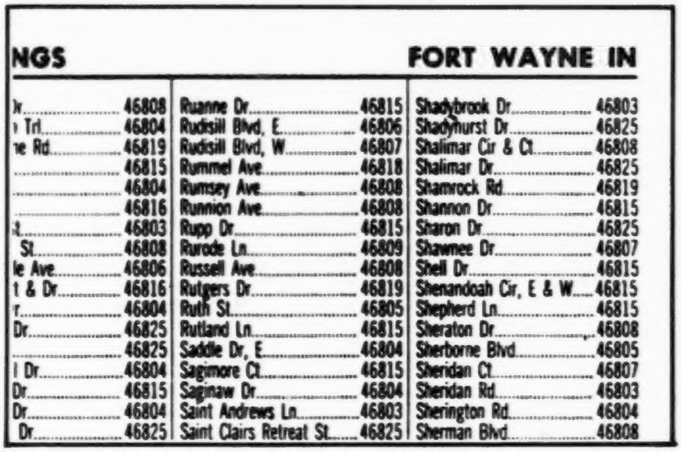
MRS ROSANNE HILL

13. Type the address in all capital letters without punctuation, as shown.



MRS ROSANNE HILL
149 WEST WALNUT
SIKESTON MO 63801

14. If the Zip Code does not appear on the inside address of the letter, consult your company's current mailing list. This may be maintained on index cards, photocopied lists, or on a floppy disk. (If the customer or company is not listed, make a note to add it to the list.) You may use a Zip Code Directory to locate the appropriate Zip Code.

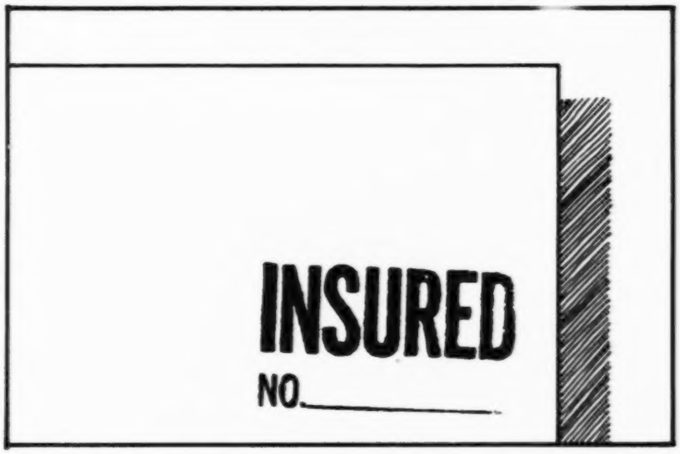


NGS

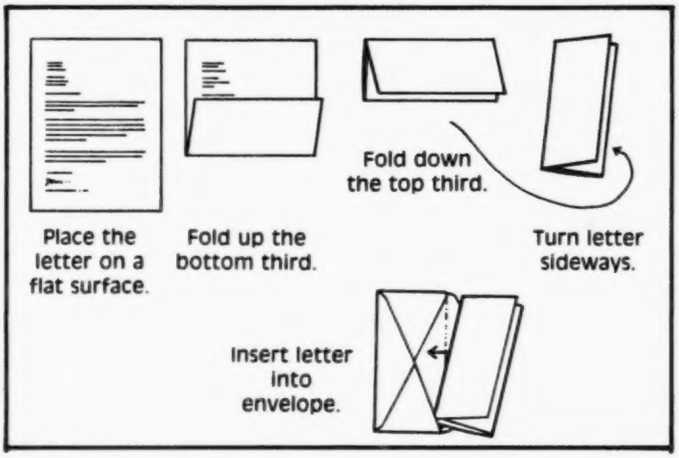
FORT WAYNE IN

| | | | | | |
|---|---|---|---|---|---|
| r | 46808 | Ruanne Dr | 46815 | Shadybrook Dr | 46803 |
| Trl | 46804 | Rudisill Blvd, E | 46806 | Shadyhurst Dr | 46825 |
| e Rd | 46819 | Rudisill Blvd, W | 46807 | Shalimar Cir & Ct | 46808 |
| | 46815 | Rummel Ave | 46818 | Shalimar Dr | 46825 |
| | 46804 | Rumsey Ave | 46808 | Shamrock Rd | 46819 |
| | 46816 | Runnion Ave | 46808 | Shannon Dr | 46815 |
| t | 46803 | Rupp Dr | 46815 | Sharon Dr | 46825 |
| St | 46808 | Rurode Ln | 46809 | Shawnee Dr | 46807 |
| le Ave | 46806 | Russell Ave | 46808 | Shell Dr | 46815 |
| t & Dr | 46816 | Rutgers Dr | 46819 | Shenandoah Cir, E & W | 46815 |
| r | 46804 | Ruth St | 46805 | Shepherd Ln | 46815 |
| Dr | 46825 | Rutland Ln | 46815 | Sheraton Dr | 46808 |
| | 46825 | Saddle Dr, E | 46804 | Sherborne Blvd | 46805 |
| l Dr | 46804 | Sagimore Ct | 46815 | Sheridan Ct | 46807 |
| Dr | 46815 | Saginaw Dr | 46804 | Sheridan Rd | 46803 |
| Dr | 46804 | Saint Andrews Ln | 46803 | Sherington Rd | 46804 |
| Dr | 46825 | Saint Clairs Retreat St | 46825 | Sherman Blvd | 46808 |

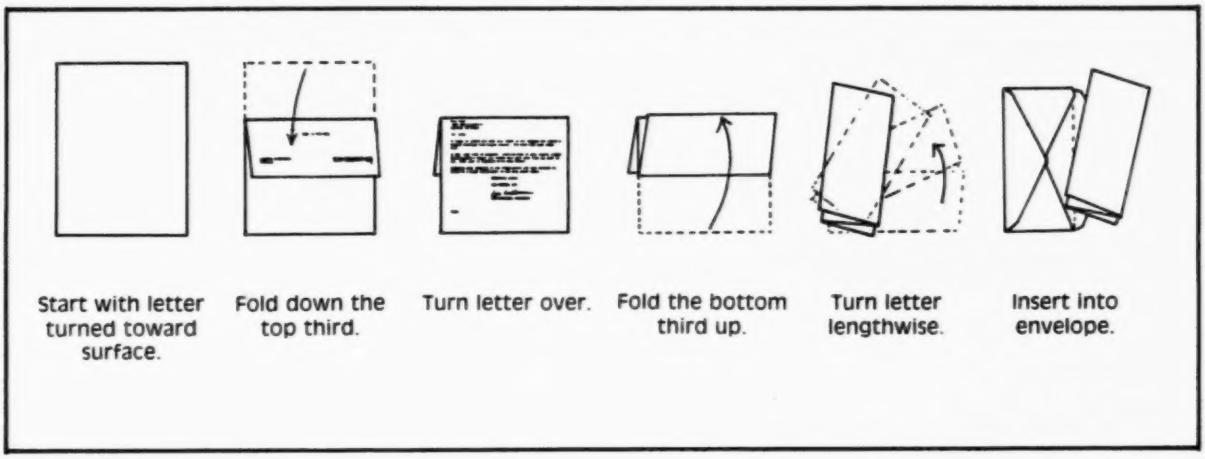
15. Type or stamp mailing notations such as "Insured," "Registered," and "Certified" a double space below the area where the postage will be placed on the envelope.



16. Fold the correspondence and insert it into the No. 10 envelope following the example shown here.

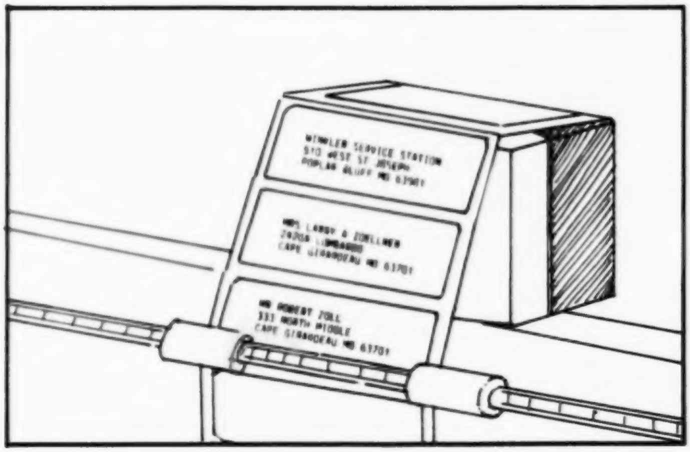

Place the letter on a flat surface.
Fold up the bottom third.
Fold down the top third.
Turn letter sideways.
Insert letter into envelope.

17. For window envelopes, fold the correspondence in this manner.

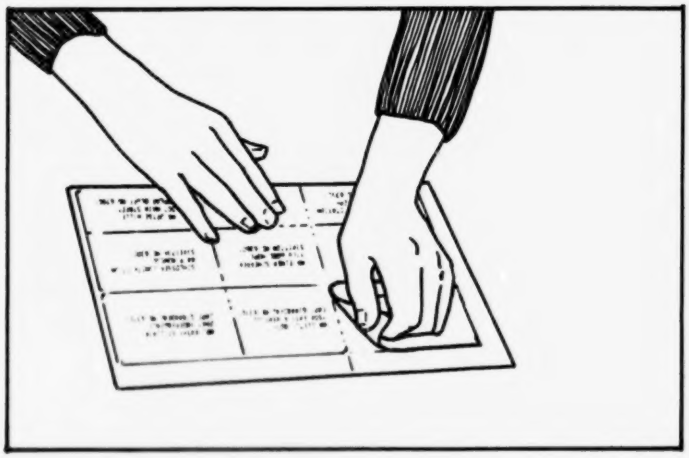


## To address a manilla envelope. .

18. Prepare a mailing label.

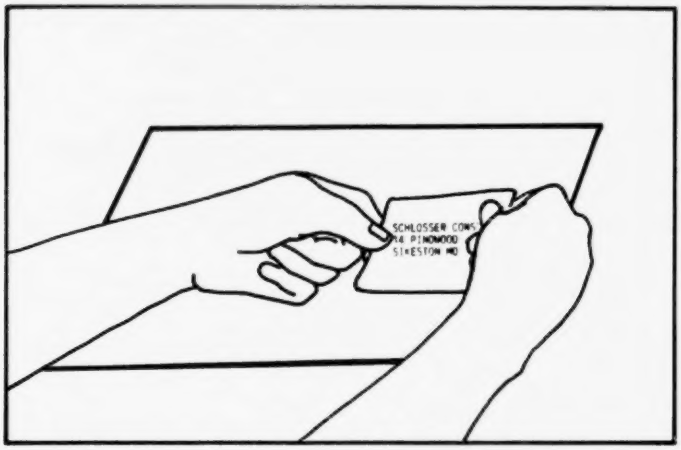


19. Lift the label from the backing strip.

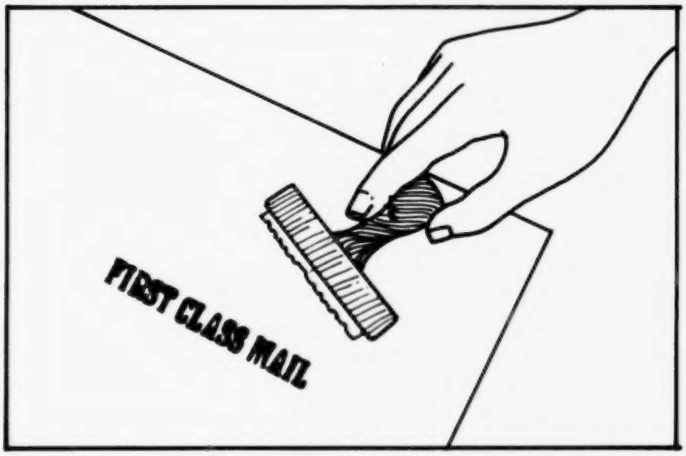


20. Stick the label in the lower right area of the manilla envelope.

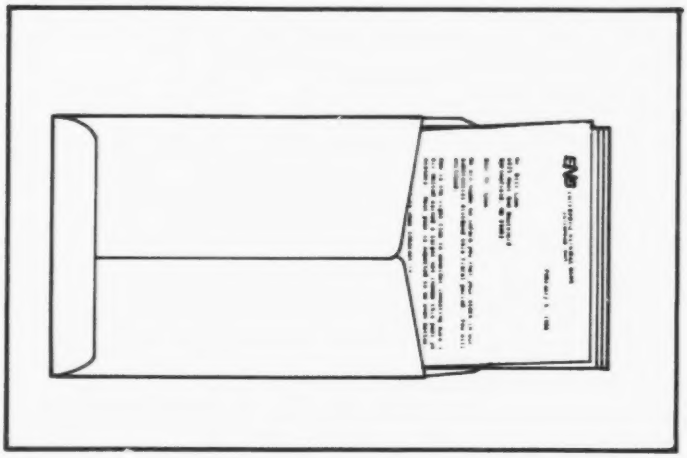
**NOTE: Either attach a return address label or stamp it on.**



21. Use a rubber stamp to indicate mailing notations such as "First-Class."

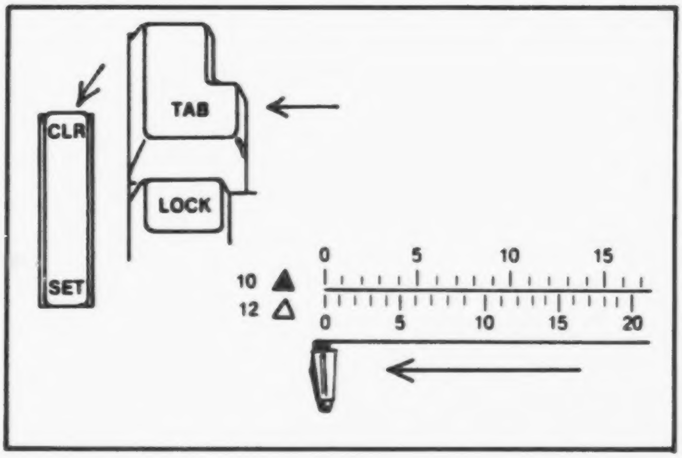


22. Insert the correspondence.

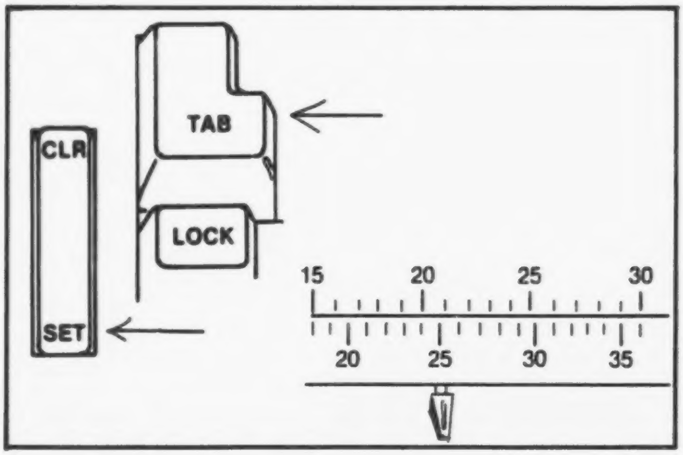


**If using No. 6¾" envelope, type the address on the envelope in the following manner:**

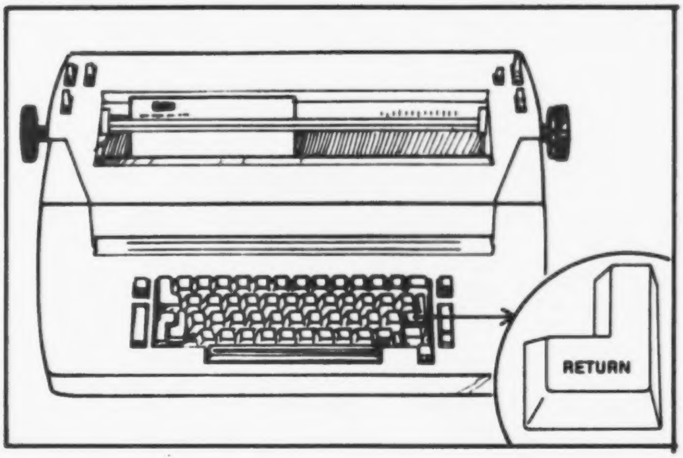
23. Prepare the typewriter by clearing all margins and tab stops.



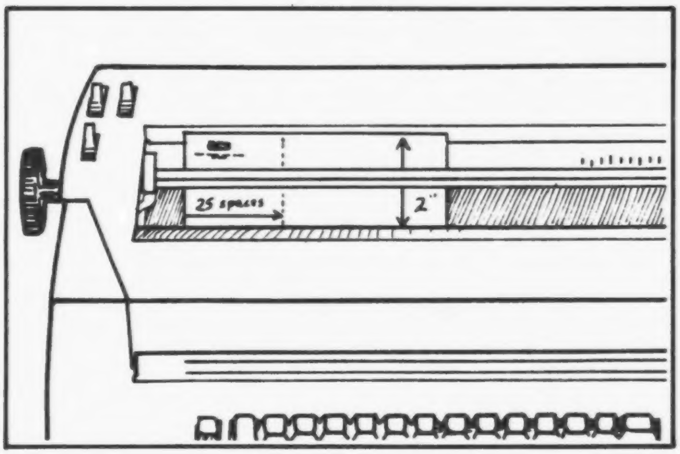
24. Set a tab stop at 25 if you are using an elite typewriter. (Set tab stop at 20 if you are using pica.)



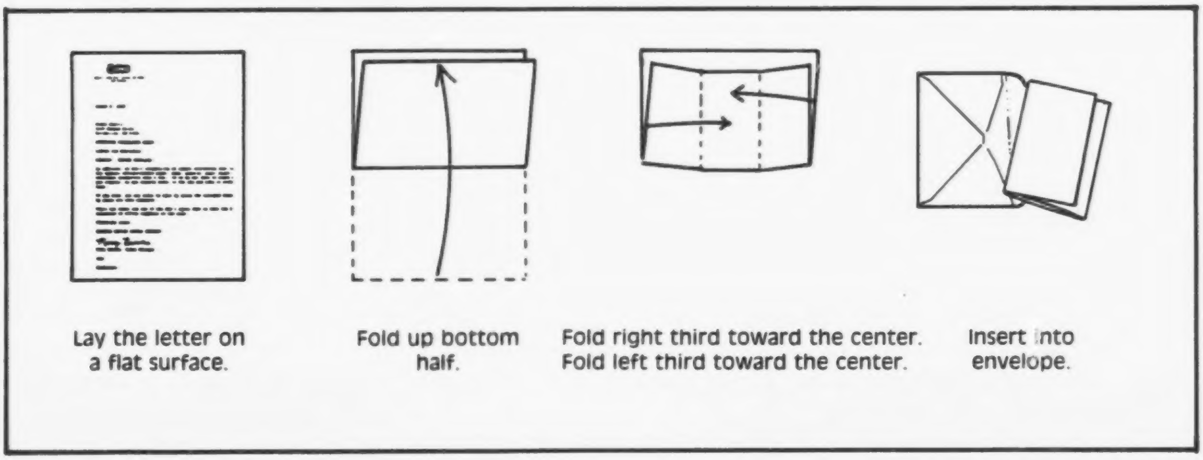
25. Insert the envelope into the typewriter and space down to line 13 from the top of the envelope.



26. Tab over to 25 (or 20) and begin the first line of the address.



27. Fold the correspondence as shown and insert into envelope.


Lay the letter on a flat surface.

Fold up bottom half.

Fold right third toward the center. Fold left third toward the center.

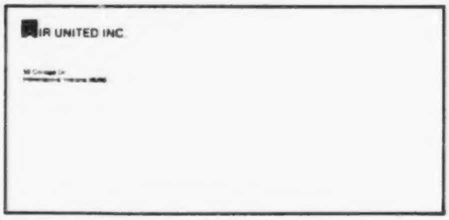
Insert into envelope.

**DO SKILL SHEET 1**

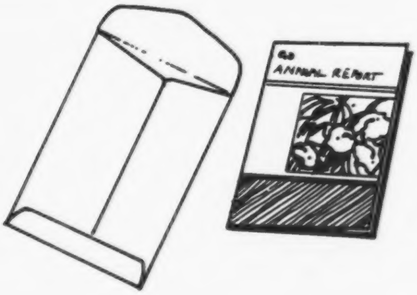
## Outgoing Mail
# Skill Sheet 1

**Directions:** After studying the different types of envelopes shown here, answer the practice problems that follow.

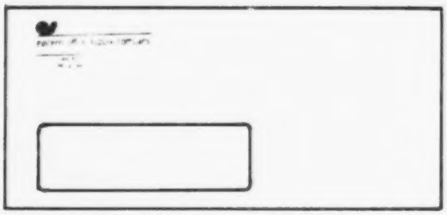
1. General correspondence is usually mailed in No. 10 Envelopes.



2. Use manila envelopes for correspondence which should not be folded.



3. Window envelopes may be used with general correspondence, statements, or business forms.



4. No. 6¾ envelopes may be used with paper which is less than 6½ inches across. General correspondence may also be sent in these envelopes.

5. "Advertising mail" is mailed in envelopes which have been imprinted with the bulk rate emblem.

BULK RATE
US POSTAGE
PAID
Company's Name
Permit No.

**Directions:** Write the correct letter in the space provided. The answers may be used more than once. Some questions may have more than one answer.

_____ 1. A letter and 20-page report should be mailed in this envelope.

_____ 2. A letter typed on 8"x11½" stationery would be mailed in this envelope.

_____ 3. Advertising literature mailed to 300 customers

_____ 4. Monthly statements sent out by a florist's shop

_____ 5. A purchase order

_____ 6. A 5"x 7" photograph

A. No. 10 envelope

B. manilla envelope

C. window envelope

D. No. 6¾ envelope

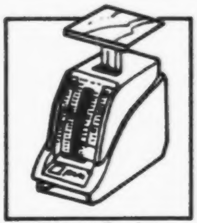
E. bulk rate envelope

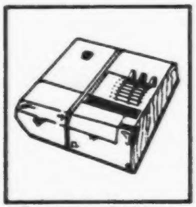
## C. Steps for Sealing Envelopes and Attaching First-Class Postage

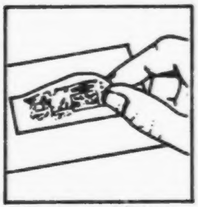
1. Assemble equipment.

Moisteners

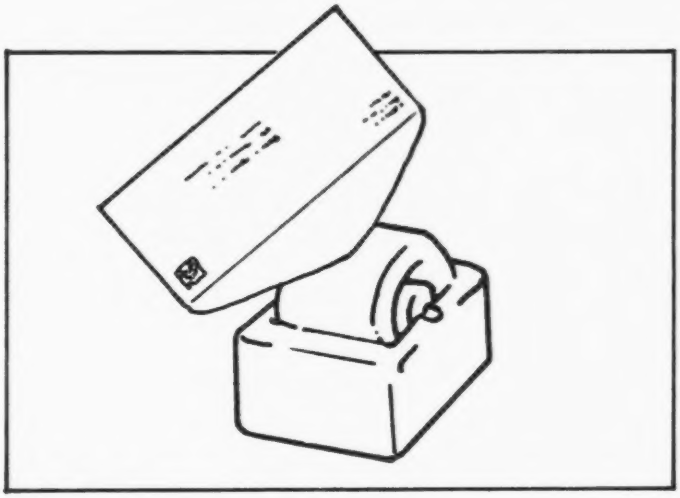
Stamp Dispenser


Postal Scales


Postage Meter


Postage Meter Label

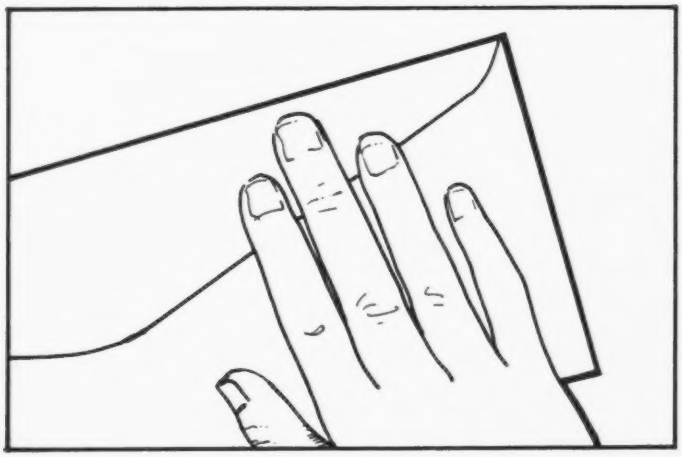
2. Moisten the gummed edges of the envelope flaps by passing them over the moistener.



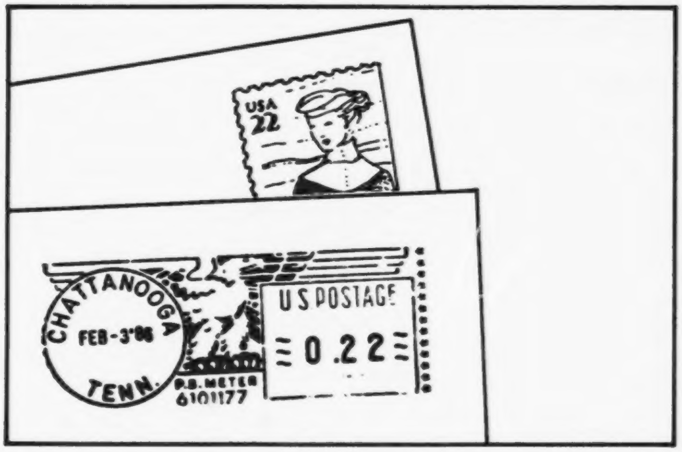
3. Press firmly to seal the envelope.

**CAUTION!**
**Be careful not to cut your finger tips on the edge of the envelope flap when folding it.**

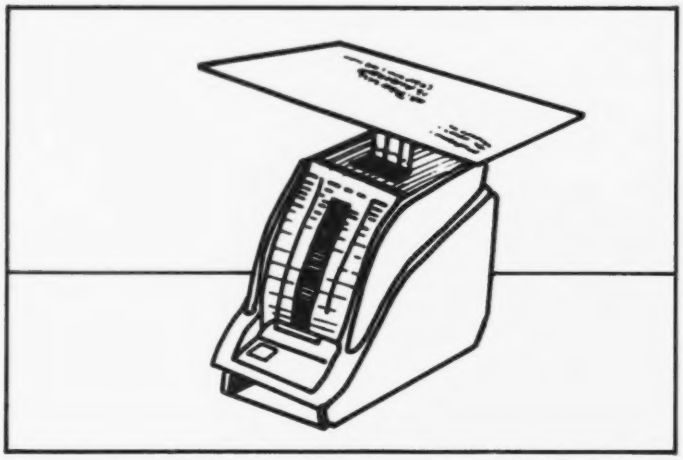
**NOTE:**
**Envelopes may also be sealed by mechanical devices called envelope sealers which are helpful when bulk mailing.**



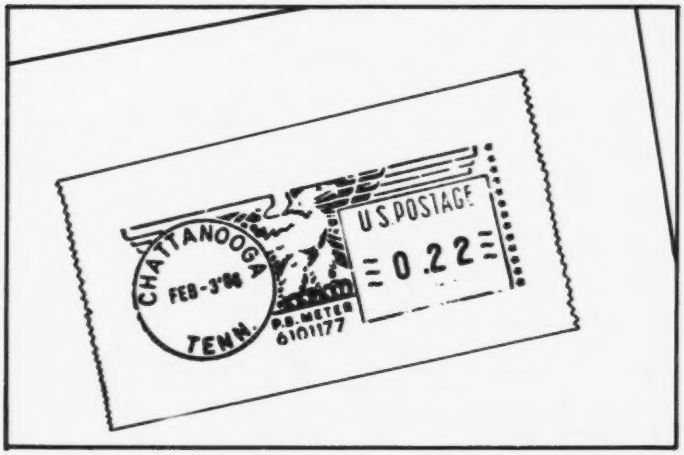
4. If the pieces of mail weigh one ounce or less, attach one stamp to each piece, or pass the mail through a postage meter which will imprint the amount of postage.



5. Weigh heavier pieces of mail individually. Attach the proper amount of postage, or reset the postage meter for the correct amount of postage.



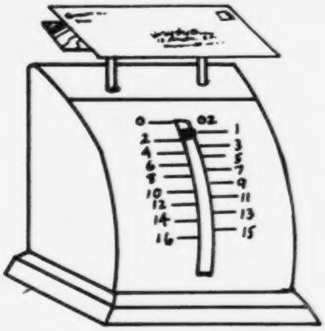
6. If the item is too thick to go through a postage meter, print the amount of the postage on a meter label. Attach it to the piece of mail.



**DO SKILL SHEET 2**

# Outgoing Mail
# Skill Sheet 2

**Directions:** After studying a postage scale and the postal chart shown here, circle the best response for the practice problems below. (You will need postage scales to answer questions 1, 3, and 5.)



First-Class Rates* for Pieces Not Exceeding Ounces Indicated

| | |
|---|---|
| 1 ounce | $0.22 |
| 2 ounces | 0.39 |
| 3 ounces | 0.56 |
| 4 ounces | 0.73 |
| 5 ounces | 0.90 |
| 6 ounces | 1.07 |
| 7 ounces | 1.24 |

Problems:

1. What is the weight of a No. 10 envelope and five sheets of paper?
   a. not more than one ounce
   b. between one and two ounces
   c. not more than three ounces

2. What is the correct postage for the envelope described and its contents?
   a. $0.22
   b. $0.39
   c. $0.56

3. What is the weight of a 9"x 12" manila envelope and six sheets of paper?
   a. not more than one ounce
   b. between one and two ounces
   c. between two and three ounces

4. What is the correct postage for the envelope describe and its contents?
   a. $0.39
   b. $0.56
   c. $0.73

5. What is the weight of a 9"x 12" manila envelope and 20 sheets of paper?
   a. not more than one ounce
   b. between one and two ounces
   c. between two and three ounces
   d. between three and four ounces

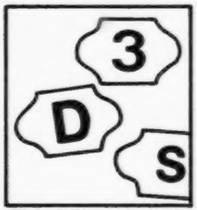
6. What is the correct postage for the envelope described and its contents?
   a. $0.22
   b. $0.39
   c. $0.56
   d. $0.73

*The first ounce costs 22 cents. Each additional ounce costs 17 additional cents. For pieces over 12 ounces, see postal brochures on First-Class Zone Rated (Priority) Mail rates.

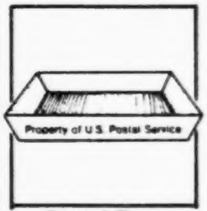
## D. Steps for Speeding Mail through the Post Office

1. Assemble equipment.

Rubber Bands

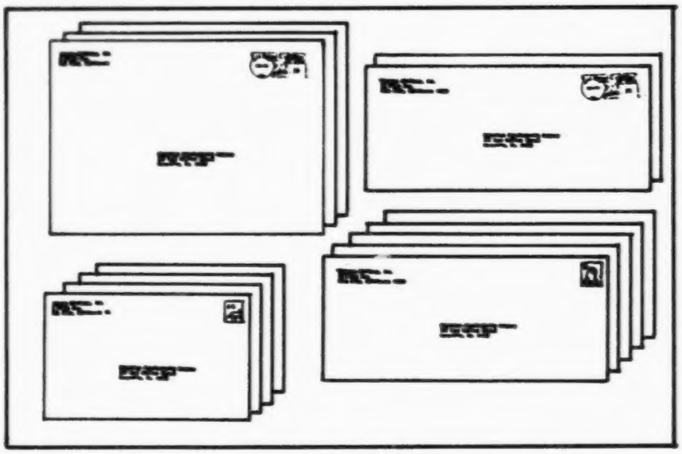


Third-Class Labels


Property of U.S. Postal Service
Postal Tray

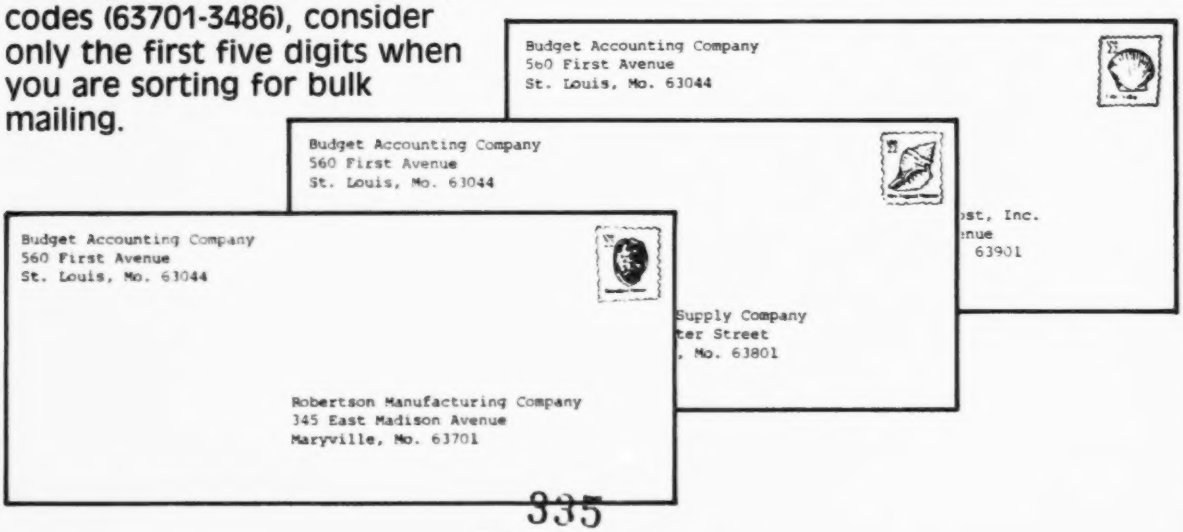
**To assemble First-Class Mail. . .**

2. Sort envelopes according to size.
3. Keep metered mail separate from mail with postage stamps.



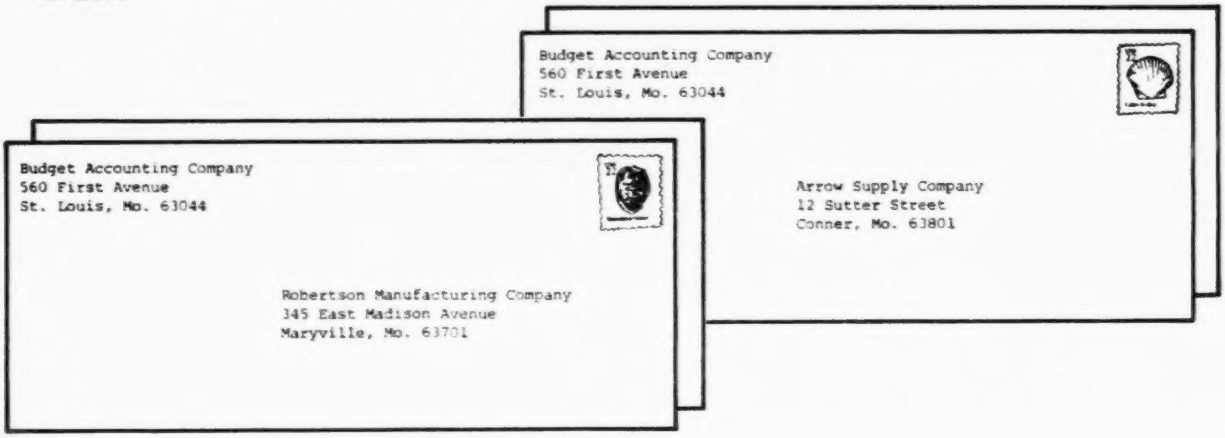
4. Sort envelopes in Zip Code order.

**NOTE: Although some envelopes will have 9-digit zip codes (63701-3486), consider only the first five digits when you are sorting for bulk mailing.**



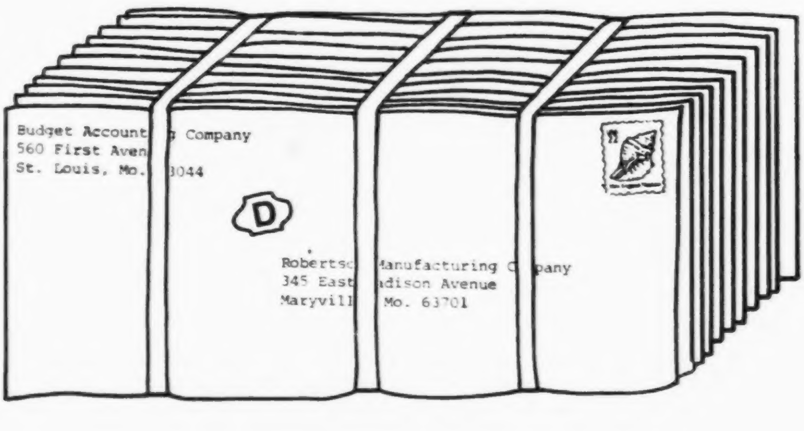
**To bundle Third-Class or Bulk Rate Mail (at least 200 pieces of mail). . .**

5. Sort the envelopes in Zip Code order.

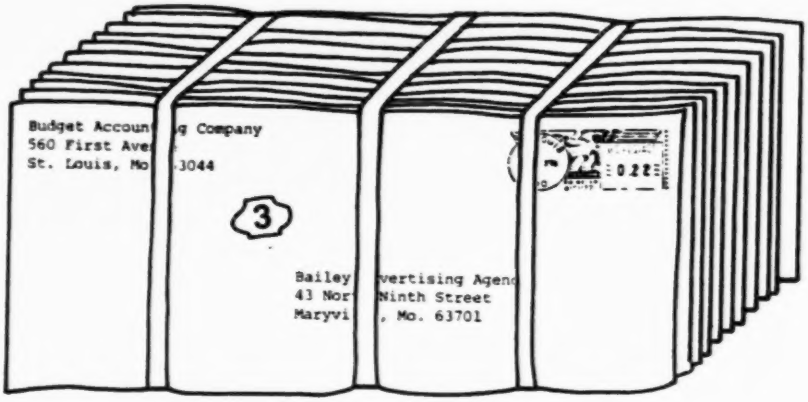


6. Bundle together envelopes addressed to the same 5-digit Zip Code. There should be at least 10 envelopes in the bundle. However, a bundle should not be more than 4 inches thick.

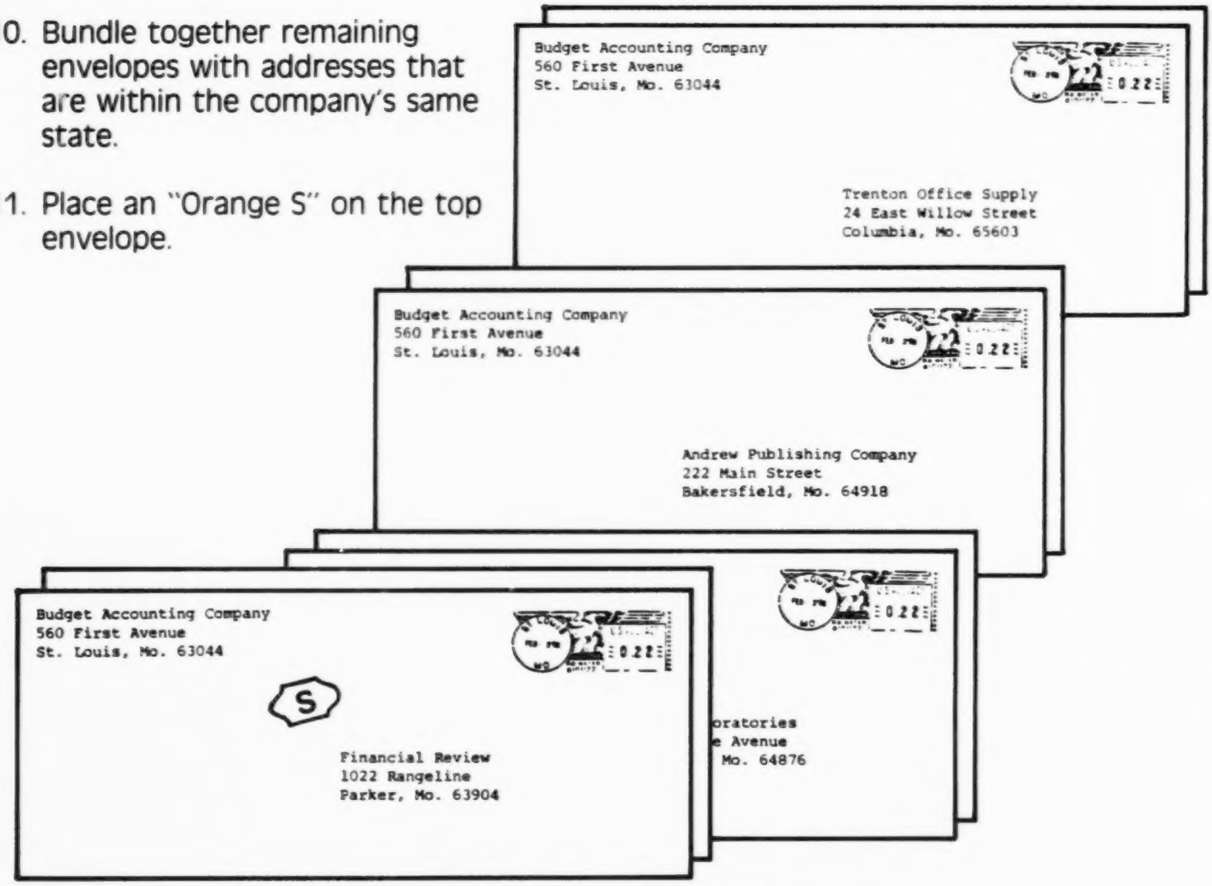
7. Place a "Red D" on the top envelope.



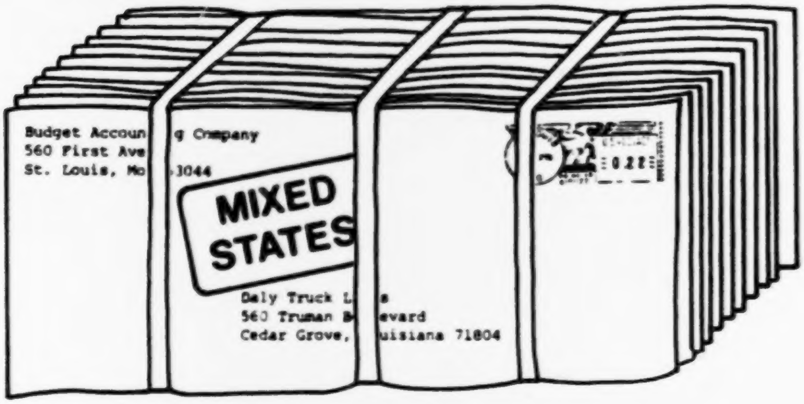
8. Bundle together the remaining envelopes with addresses that have the same first 3 digits.
9. Place a "Green 3" on the top envelope.



10. Bundle together remaining envelopes with addresses that are within the company's same state.
11. Place an "Orange S" on the top envelope.

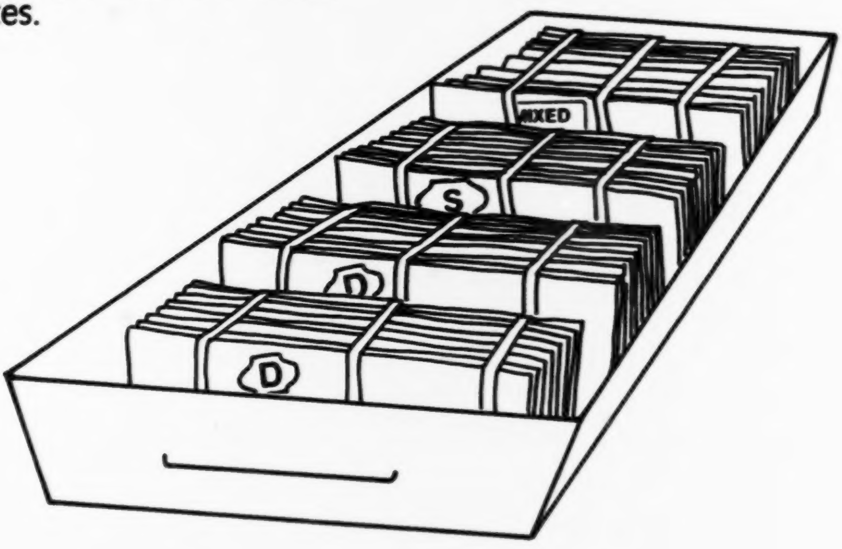


13. Place a "Facing Slip" on the top of this bundle.

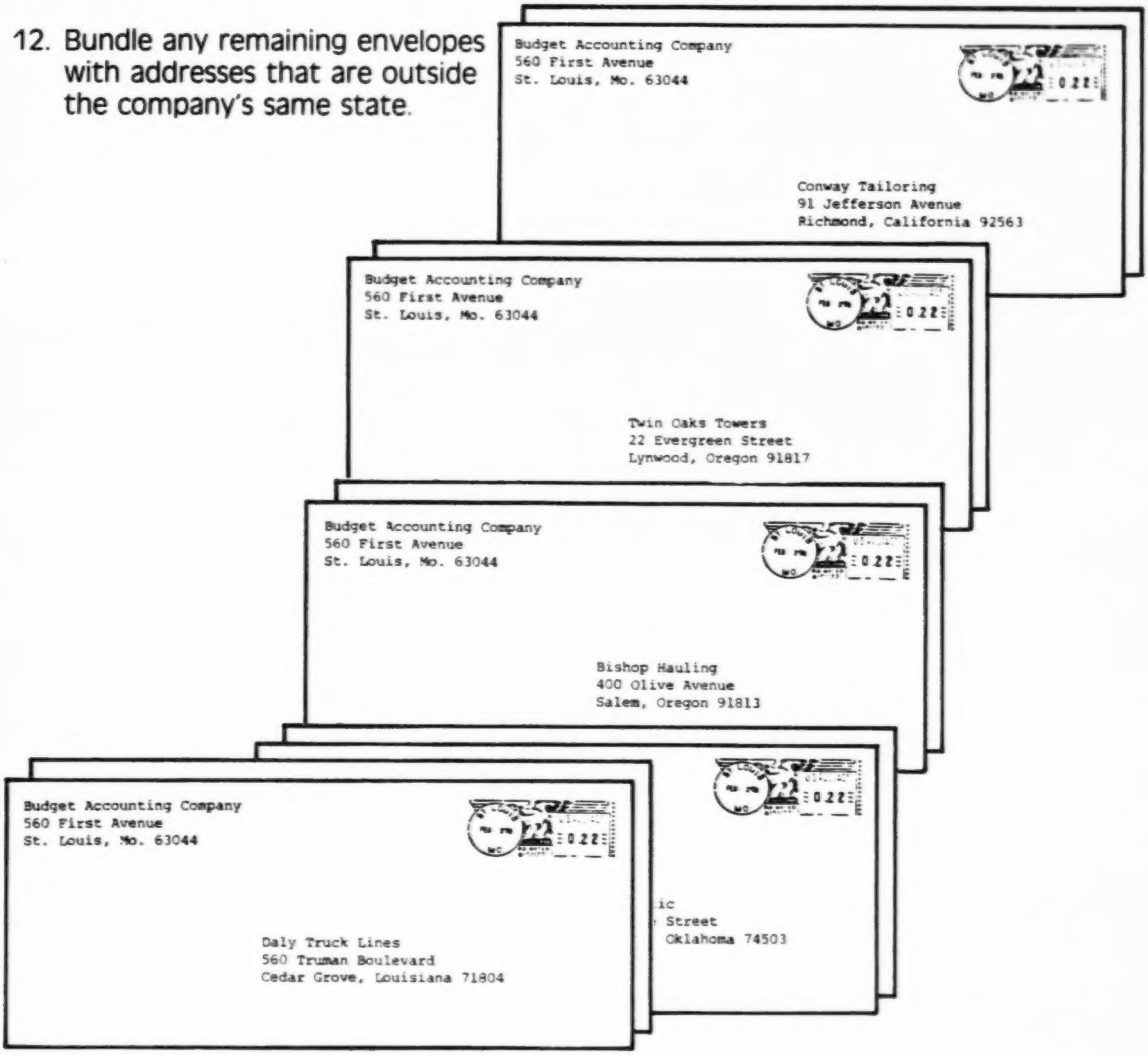


14. Place bundles in Zip Code order into a postal tray for delivery to the post office.

**NOTE: 5-digit mailings (red D) are placed in front of the tray, followed by 3-digit bundles (green D), followed by same state bundles (orange S); the last bundle in the tray will be for mixed states.**



12. Bundle any remaining envelopes with addresses that are outside the company's same state.



Budget Accounting Company
560 First Avenue
St. Louis, Mo. 63044

Conway Tailoring
91 Jefferson Avenue
Richmond, California 92563

Budget Accounting Company
560 First Avenue
St. Louis, Mo. 63044

Twin Oaks Towers
22 Evergreen Street
Lynwood, Oregon 91817

Budget Accounting Company
560 First Avenue
St. Louis, Mo. 63044

Bishop Hauling
400 Olive Avenue
Salem, Oregon 91813

ic
Street
Oklahoma 74503

Budget Accounting Company
560 First Avenue
St. Louis, Mo. 63044

Daly Truck Lines
560 Truman Boulevard
Cedar Grove, Louisiana 71804

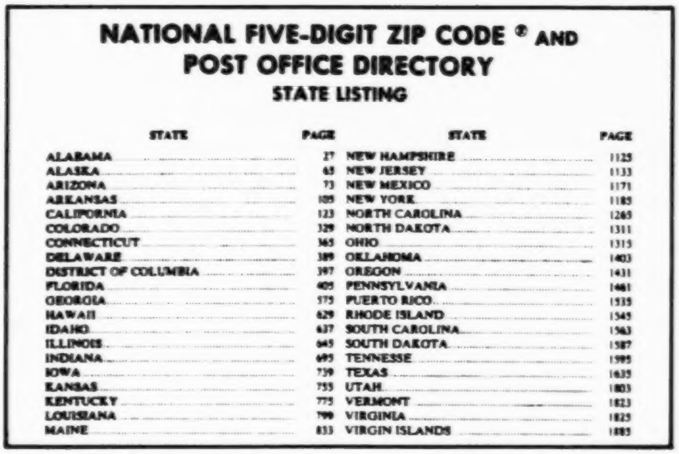
## E. Steps for Using a Zip Code Directory

A Zip Code Directory usually is divided into three major sections.

- The introductory pages may include a Table of Contents, a List of Zip Code Maps, an Introduction, an Index, and a List of Postal Rates.
- The major portion of the directory is the listing of cities and Zip Codes.
- Large cities are usually assigned more than one Zip Code. Information concerning a Zip Code for a particular street address of a large city may be located in a Zip Code Directory's appendix section.

**To locate a particular Zip Code, follow these steps:**

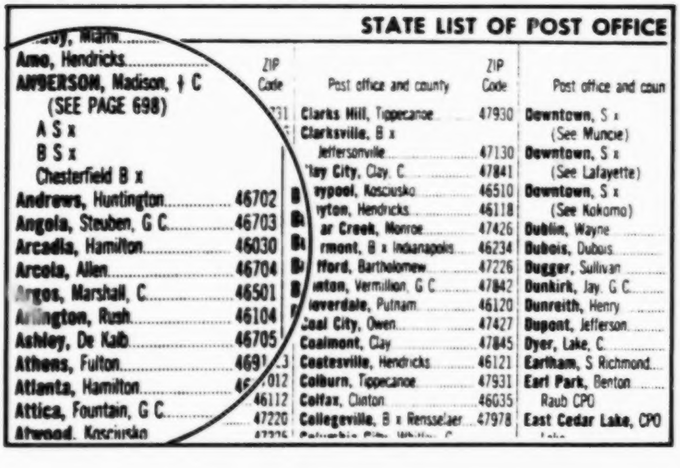
1. Find the index to states.
2. Find the state you need, for example, the state of Indiana. Write down the number of the page given.



**NATIONAL FIVE-DIGIT ZIP CODE ® AND POST OFFICE DIRECTORY**
**STATE LISTING**

| STATE | PAGE | STATE | PAGE |
|---|---|---|---|
| ALABAMA | 27 | NEW HAMPSHIRE | 1125 |
| ALASKA | 65 | NEW JERSEY | 1133 |
| ARIZONA | 73 | NEW MEXICO | 1171 |
| ARKANSAS | 105 | NEW YORK | 1185 |
| CALIFORNIA | 123 | NORTH CAROLINA | 1265 |
| COLORADO | 329 | NORTH DAKOTA | 1311 |
| CONNECTICUT | 365 | OHIO | 1315 |
| DELAWARE | 389 | OKLAHOMA | 1403 |
| DISTRICT OF COLUMBIA | 397 | OREGON | 1431 |
| FLORIDA | 405 | PENNSYLVANIA | 1461 |
| GEORGIA | 575 | PUERTO RICO | 1535 |
| HAWAII | 629 | RHODE ISLAND | 1545 |
| IDAHO | 637 | SOUTH CAROLINA | 1563 |
| ILLINOIS | 645 | SOUTH DAKOTA | 1587 |
| INDIANA | 695 | TENNESSE | 1595 |
| IOWA | 739 | TEXAS | 1635 |
| KANSAS | 755 | UTAH | 1803 |
| KENTUCKY | 775 | VERMONT | 1823 |
| LOUISIANA | 799 | VIRGINIA | 1825 |
| MAINE | 833 | VIRGIN ISLANDS | 1885 |

3. Turn to the page indicated. If the city (post office) you need should be Arlington, Indiana, look down the alphabetical listing until you find Arlington and its Zip Code, 46104.
4. If the post office you need is Anderson, you should turn to the page indicated.

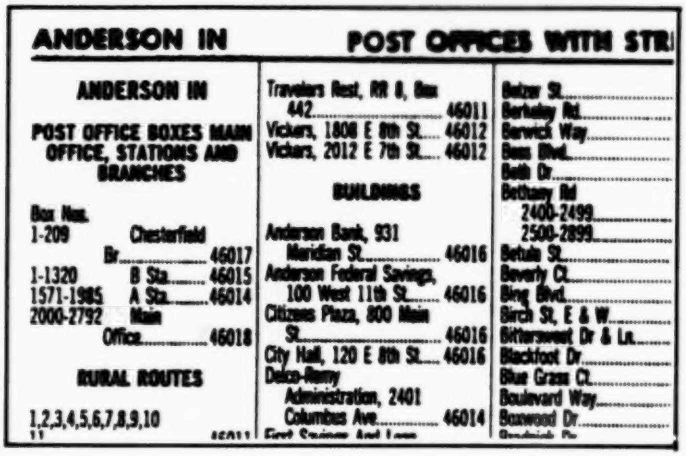


**STATE LIST OF POST OFFICE**

**Amo,** Hendricks
**ANDERSON,** Madison, ‡ C
(SEE PAGE 698)
A S x
B S x
Chesterfield B x
**Andrews,** Huntington 46702
**Angola,** Steuben, G C 46703
**Arcadia,** Hamilton 46030
**Arcola,** Allen 46704
**Argos,** Marshall, C 46501
**Arlington,** Rush 46104
**Ashley,** De Kalb 46705
**Athens,** Fulton
**Atlanta,** Hamilton
**Attica,** Fountain, G C

| ZIP Code | Post office and county | ZIP Code | Post office and coun |
|---|---|---|---|
| | **Clarks Hill,** Tippecanoe | 47930 | **Downtown,** S x (See Muncie) |
| | **Clarksville,** B x Jeffersonville | 47130 | **Downtown,** S x (See Lafayette) |
| | **City,** Clay, C | 47841 | |
| | **ypool,** Kosciusko | 46510 | **Downtown,** S x (See Kokomo) |
| | **yton,** Hendricks | 46118 | |
| | **ar Creek,** Monroe | 47426 | **Dublin,** Wayne |
| | **rmont,** B x Indianapolis | 46234 | **Dubois,** Dubois |
| | **fford,** Bartholomew | 47226 | **Dugger,** Sullivan |
| | **nton,** Vermillion, G C | 47842 | **Dunkirk,** Jay, G C |
| | **loverdale,** Putnam | 46120 | **Dunreith,** Henry |
| | **Coal City,** Owen | 47427 | **Dupont,** Jefferson |
| | **Coalmont,** Clay | 47845 | **Dyer,** Lake, C |
| | **Coatesville,** Hendricks | 46121 | **Earlham,** S Richmond |
| 012 | **Colburn,** Tippecanoe | 47931 | **Earl Park,** Benton Raub CPO |
| 46112 | **Colfax,** Clinton | 46035 | |
| 47220 | **Collegeville,** B x Rensselaer | 47978 | **East Cedar Lake,** CPO |

5. If the company you are writing to has a Post Office Box number of 1109 and is located in Anderson, Indiana, the Zip Code for the company would be 46015.



**ANDERSON IN** **POST OFFICES WITH STR**

**ANDERSON IN**

**POST OFFICE BOXES MAIN OFFICE, STATIONS AND BRANCHES**

| | | |
|---|---|---|
| Box Nos. | | |
| 1-209 | Chesterfield Br. | 46017 |
| 1-1320 | B Sta. | 46015 |
| 1571-1985 | A Sta. | 46014 |
| 2000-2792 | Main Office | 46018 |

**RURAL ROUTES**

1,2,3,4,5,6,7,8,9,10

11 ........ 46011

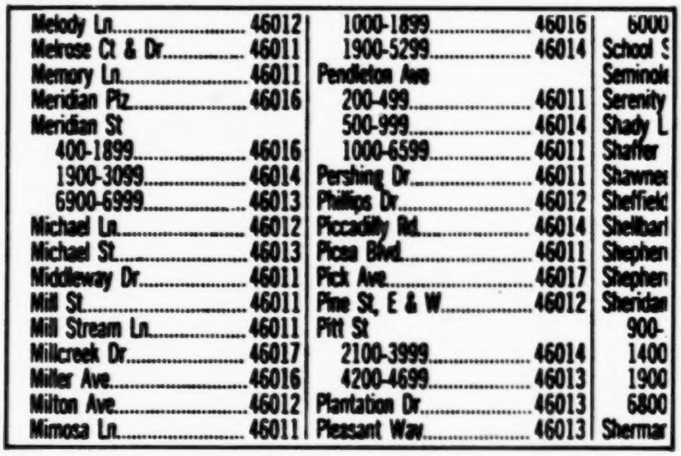
Travelers Rest, RR 8, Box 442 ........ 46011
Vickers, 1808 E 8th St. ........ 46012
Vickers, 2012 E 7th St. ........ 46012

**BUILDINGS**

Anderson Bank, 931 Meridian St. ........ 46016
Anderson Federal Savings, 100 West 11th St. ........ 46016
Citizens Plaza, 800 Main St. ........ 46016
City Hall, 120 E 8th St. ........ 46016
Delco-Remy Administration, 2401 Columbus Ave. ........ 46014
First Savings And Loan

Belzer St. ........
Berkeley Rd. ........
Berwick Way ........
Bess Blvd. ........
Beth Dr. ........
Bethany Rd
2400-2499 ........
2500-2899 ........
Betula St. ........
Beverly Ct. ........
Bing Blvd. ........
Birch St, E & W. ........
Bittersweet Dr & Ln. ........
Blackfoot Dr. ........
Blue Grass Ct. ........
Boulevard Way ........
Boxwood Dr. ........

6. If the company you are writing to has a street address of 436 Meridian and is in Anderson, Indiana, the Zip Code for the company would be 46016.



| | | | | |
|---|---|---|---|---|
| Melody Ln. | 46012 | 1000-1899 | 46016 | 6000 |
| Melrose Ct & Dr. | 46011 | 1900-5299 | 46014 | School |
| Memory Ln. | 46011 | Pendleton Ave | | Seminol |
| Meridian Plz. | 46016 | 200-499 | 46011 | Serenity |
| Meridian St | | 500-999 | 46014 | Shady L |
| 400-1899 | 46016 | 1000-6599 | 46011 | Shaffer |
| 1900-3099 | 46014 | Pershing Dr. | 46011 | Shawne |
| 6900-6999 | 46013 | Phillips Dr. | 46012 | Sheffiel |
| Michael Ln. | 46012 | Piccadilly Rd. | 46014 | Shellbar |
| Michael St. | 46013 | Picea Blvd. | 46011 | Shephen |
| Middleway Dr. | 46011 | Pick Ave. | 46017 | Shephen |
| Mill St. | 46011 | Pine St, E & W. | 46012 | Sheridan |
| Mill Stream Ln. | 46011 | Pitt St | | 900- |
| Millcreek Dr. | 46017 | 2100-3999 | 46014 | 1400 |
| Miller Ave. | 46016 | 4200-4699 | 46013 | 1900 |
| Milton Ave. | 46012 | Plantation Dr. | 46013 | 6800 |
| Mimosa Ln. | 46011 | Pleasant Way | 46013 | Shermar |

## DO SKILL SHEET 3

# Outgoing Mail
# Skill Sheet 3

**Directions:** Locate the Zip Codes for the following addresses of branch offices of the Adams Corporation.

1. Adams Corporation
79 Westerly Avenue
Bethel, ME ______

2. Adams Corporation
19 Adams Boulevard
Barker, TX ______

3. Adams Corporation
2702 Braemore Road
Columbia, MO ______

4. Adams Corporation
4710 Whitney Drive
Fayetteville, NC ______

5. Adams Corporation
147 North Main Street
Sioux Falls, SD ______

6. Adams Corporation
707 Market Street
St. Louis, MO ______

7. Adams Corporation
302 North Linn Street
Garden City, RI ______

8. Adams Corporation
270 East Parker Road
Sunnyside, WA ______

## Outgoing Mail
# Unit Review

**Directions:** Circle the letter showing the best answer for each question.

1. An invoice should NOT be mailed in this kind of envelope.
   a. No. 10 envelope
   b. manila envelope
   c. window envelope
   d. bulk rate envelope

2. Bulk mail is an example of:
   a. First-Class Mail
   b. Second-Class Mail
   c. Third-Class Mail
   d. Fourth-Class Mail

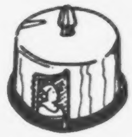
3. An enclosure notation is your clue for:
   a. affixing extra postage
   b. attaching enclosures to the correspondence
   c. photocopying an extra copy

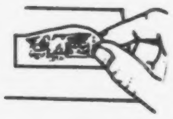
4. Use a zip code directory to find zip codes for the following cities.
   a. Sweet Water, IL ____________________
   b. Box Number 5001, Portland, ME ____________
   c. Hatton, VA ________________________

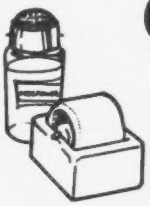
5. Correctly fold the letter on the next page and insert it into a No. 10 envelope.

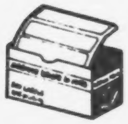
6. Weigh a No. 10 envelope and four sheets of paper. Answer the following questions.
   a. What is the total weight in ounces? ____________________
   b. How much First-Class Mail postage would be affixed to the envelope? ____

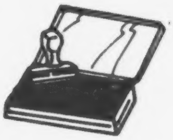
7. Draw a line from the name of the equipment to its correct picture.
   a. meter label
   b. mailing label
   c. stamp dispenser
   d. rubber stamp
   e. moistener











Mountain Plains Chemicals, Inc.
334 Jefferson Street
Reeds Spring, MO 65737

August 22, 1986

Mrs. Jennifere Collins
123 Wendle Lane
Reed Springs, MO 65737

Dear Mrs. Collins:

Your request for a charge account at Mountain Plains Chemicals, Inc., is very much appreciated.

Your request is being reviewed. However, we need your help. Please supply the following:

_____ Application was incomplete. Please supply the data indicated.

_____ Application was incomplete. Please sign the application as indicated.

__✓__ Please provide the names and addresses of two references.

Your application will be processed as quickly as possible. In the meantime, Mrs. Collins, you may be interested in our end-of-the-month specials on supplies for your swimming pool. In addition, bring this letter with you between the 25th and the 30th of this month for a 10 percent discount.

Sincerely,

Carolyn Merrick
Customer Accounts

CM/cr

Note: Use this letter for question #5.

# Outgoing Mail
# Performance Checklist

Student ______________________________ has successfully performed the following steps of procedure.

| Outgoing Mail Tasks | Yes | No | Comments |
|---|---|---|---|
| 1. Identified and assembled equipment | | | |
| 2. Scanned outgoing mail for: | | | |
| signatures | | | |
| enclosure notations | | | |
| mailing notations | | | |
| 3. Clipped enclosures to the correspondence | | | |
| clipped small enclosures to front of correspondence | | | |
| clipped other enclosures to back of correspondence | | | |
| 4. Chose an appropriate envelope | | | |
| 5. Typed sender's name and address on the envelope: | | | |
| spaced down to line 2 of the envelope | | | |
| spaced forward 3 spaces from left edge | | | |
| typed sender's name and address in block style, single space | | | |
| 6. Addressed a Number 10 envelope: | | | |
| cleared all margins and tabs | | | |
| set tab stop at 50 (elite) or 40 (pica) | | | |
| spaced down to line 15 | | | |
| typed receiver's name and address in all capital letters without punctuation | | | |
| 7. Addressed a Number 6¾ envelope: | | | |
| cleared all margins and tabs | | | |
| set tab stop at 25 (elite) or 20 (pica) | | | |
| spaced down to line 13 | | | |
| typed receiver's name and address in all capital letters without punctuation | | | |
| 8. Addressed a manilla envelope: | | | |
| prepared a mailing label | | | |
| attached label to lower right area of manilla envelope | | | |
| 9. Used Zip Code directory when needed | | | |
| 10. Labeled envelopes with mailing notations when needed | | | |
| 11. Folded correspondence for: | | | |
| Number 10 envelope | | | |
| Number 6¾ envelope | | | |
| Window envelope | | | |
| 12. Sealed envelopes | | | |
| 13. Weighed envelopes | | | |
| 14. Affixed postage | | | |
| 15. Assembled First-Class Mail: | | | |
| sorted envelopes by size | | | |
| spearated metered mail from mail with postage stamps | | | |
| 16. Sorted postage by Zip Code | | | |
| 17. Bundled Third-Class Mail: | | | |
| bundled and labeled envelopes addressed to the same 5-digit Zip Code | | | |
| bundled and labeled envelopes with addresses having the same first 3 digits | | | |
| bundled and labeled envelopes with addresses in the sender's same state | | | |
| bundled and labeled "Mixed States" envelopes | | | |
| placed bundles in Zip Code order into a postal tray | | | |

Satisfactory - Should Move On ☐
Repeat This Unit ☐

______________________________
**Student Signature/Date**

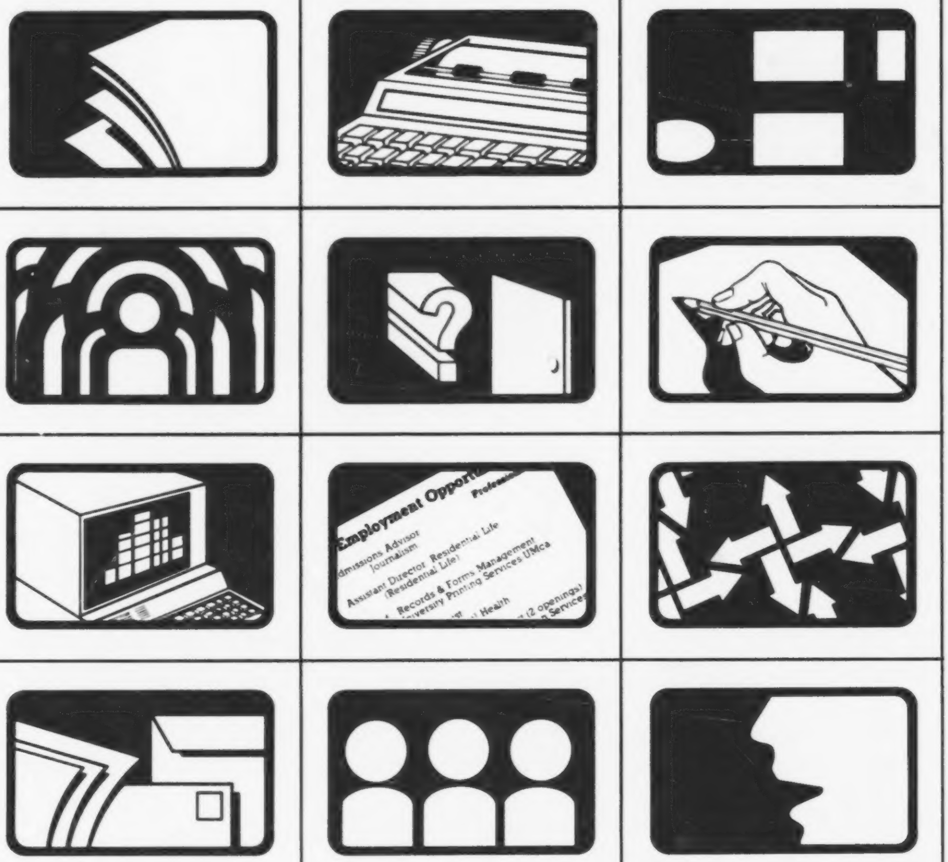
______________________________
**Instructor Signature/Date**

SN-92-S

SUPPLEMENTARY UNITS FOR
SECRETARIAL TECHNOLOGY/OFFICE TECHNOLOGY

# Decision Making and Organizing Work

## Unit 10



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## Decision Making and Organizing Work
# Introduction

Knowing how to organize your work and make effective office decisions will increase your productivity and help your office to run smoothly.

As a clerical/secretarial worker, you will have to make decisions which affect office production and work flow. To help you make the best decision there are several factors which you will want to consider before making that decision. This unit will help you to make the proper decision, and to organize your daily office work.

---

## Unit Objective

After completion of this unit, you should be able to apply decision making and time management principles to solve office problems.

## Specific Objectives

After completion of this unit, you should be able to:

1. Organize office work.
2. Use the five-step approach to make decisions.
3. Use the five-step approach to solve problems.

---

## Are You Ready?

Check the statement which is true for you.

☐

I want to study the information in this unit before doing the Performance Checklist.

**TURN TO NEXT PAGE AND BEGIN**

☐

I can do the above tasks and I am ready to do the Performance Checklist.

**SEE YOUR INSTRUCTOR**

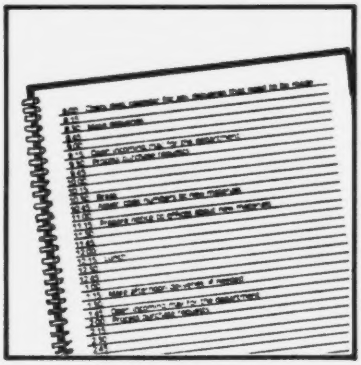
## A. Terms and Equipment Needed for Making Decisions and Solving Problems

### Terms

1. Daily schedule - plan of when to do tasks which must be performed every day.
2. Prioritize - put work tasks in order according to their importance.
3. Procedures manual - a book that outlines procedures for filing, telephone service, postal regulations, word processing, reprographics, etc.
4. Work flow - office plan telling who handles which items or tasks.

### Equipment

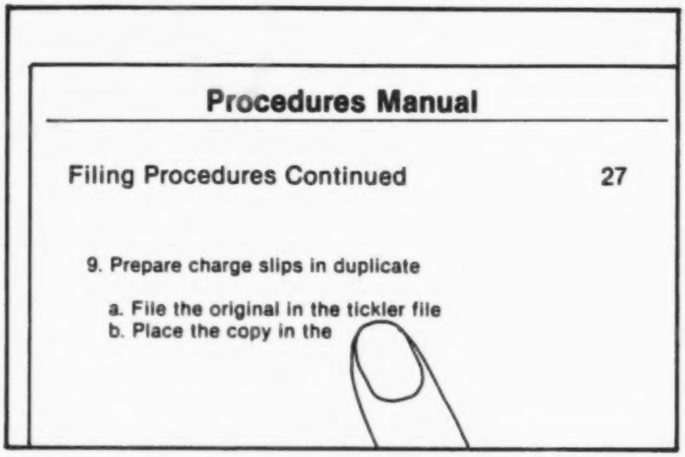
Procedures Manual



Desk Calendar

## B. Guidelines for Organizing Office Work

1. Study the company procedure manual to become thoroughly familiar with your company.

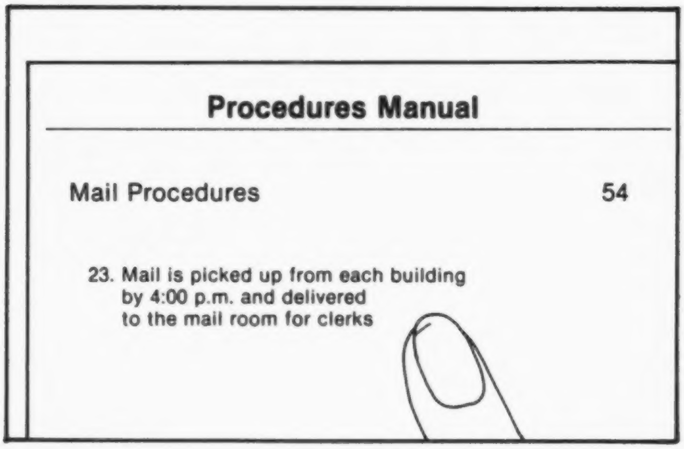


**Procedures Manual**

Filing Procedures Continued 27

9. Prepare charge slips in duplicate
   a. File the original in the tickler file
   b. Place the copy in the

2. Be familiar with the work flow.

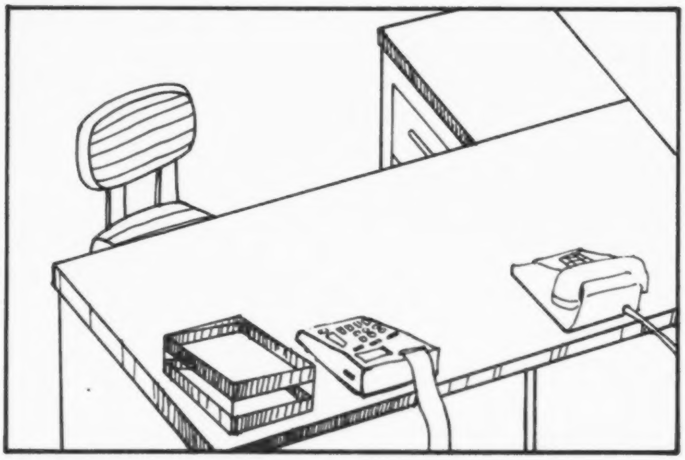


**Procedures Manual**

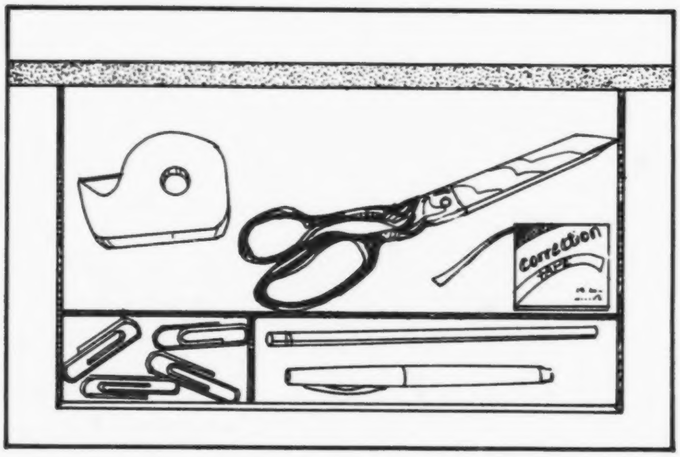
Mail Procedures 54

23. Mail is picked up from each building by 4:00 p.m. and delivered to the mail room for clerks

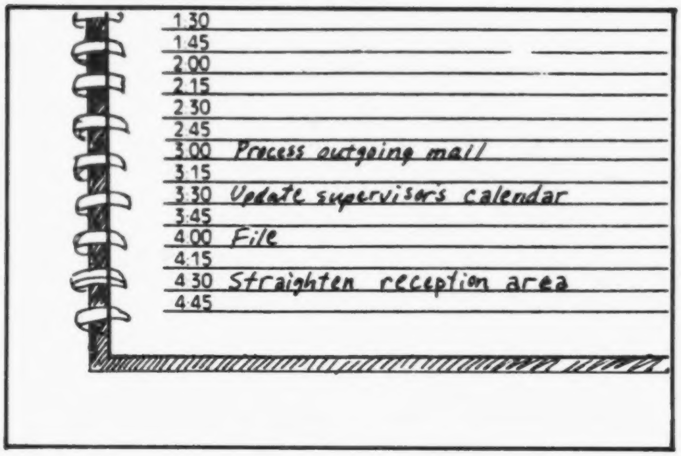
3. Organize your workspace by arranging only necessary equipment (such as the telephone) on your desk top.



4. Place frequently used supplies on the desk top or in a top desk drawer.

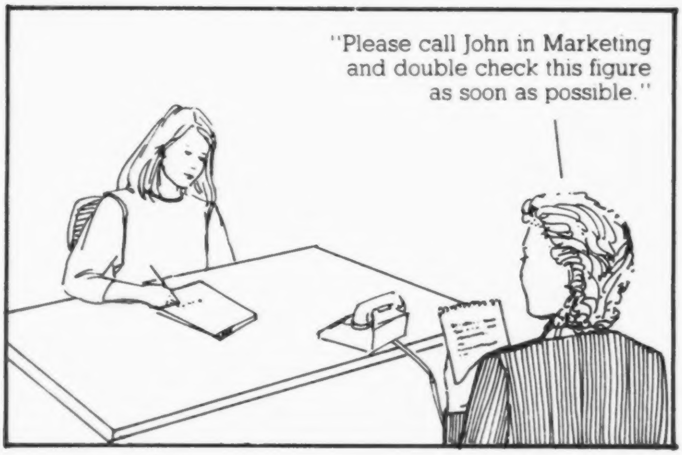


5. Plan your daily schedule.

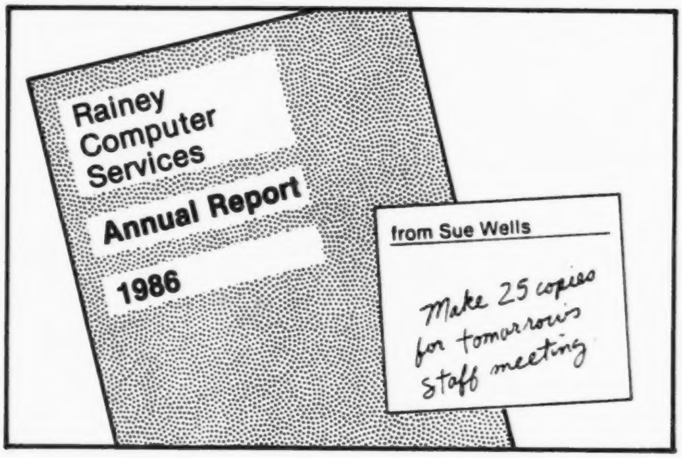

1:30
1:45
2:00
2:15
2:30
2:45
3:00 Process outgoing mail
3:15
3:30 Update supervisor's calendar
3:45
4:00 File
4:15
4:30 Straighten reception area
4:45

6. Prioritize tasks by dividing them into the following categories:

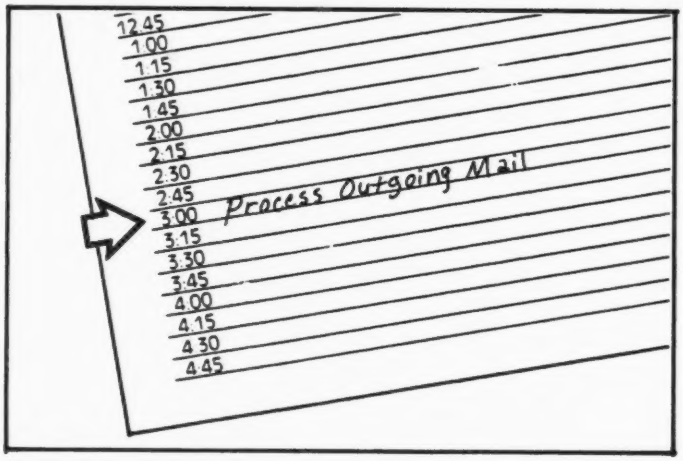
- "Rush" items,


"Please call John in Marketing and double check this figure as soon as possible."

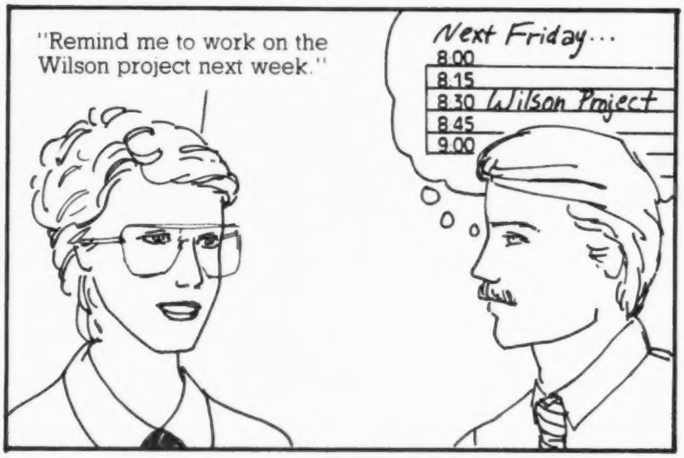
- on-going projects and assignments,



- daily items,

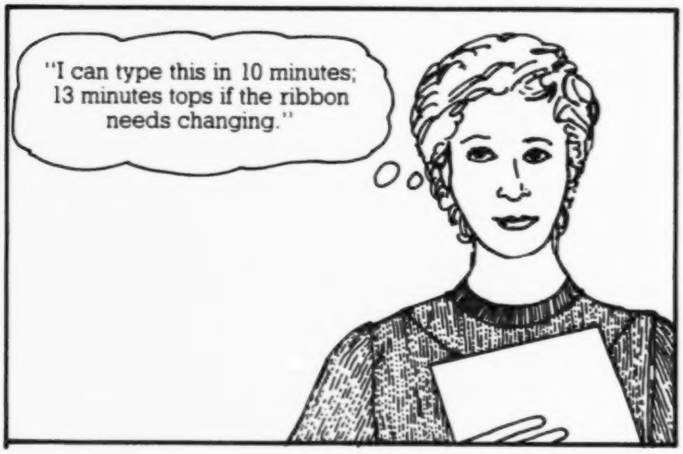


- and "can wait" items.

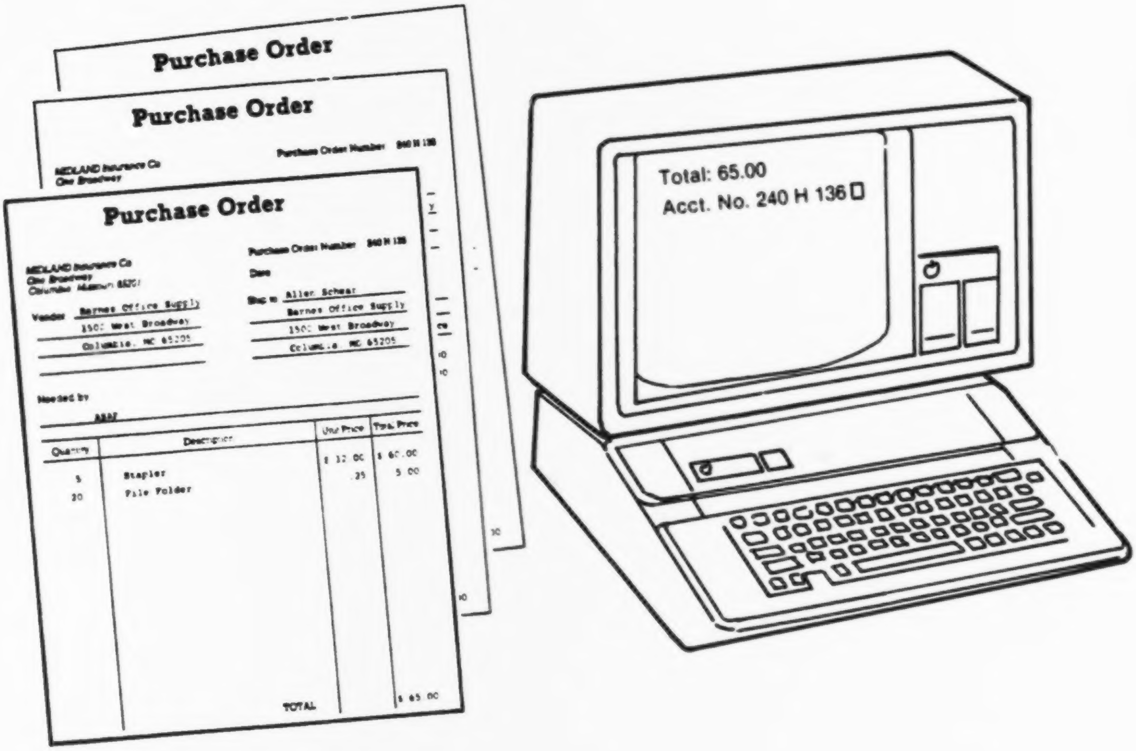

"Remind me to work on the Wilson project next week."
Next Friday...
8:00
8:15
8:30 Wilson Project
8:45
9:00

7. Set deadlines for completing each task.

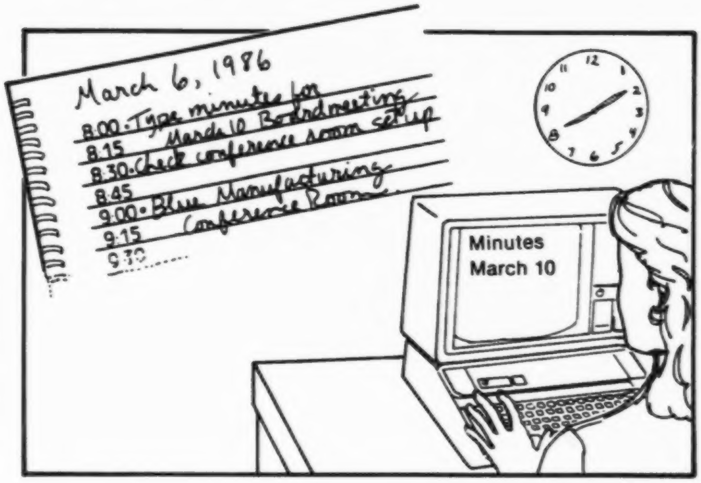
   **NOTE: Estimate the amount of time it will take to complete a task and multiply that amount by 1.25.**


"I can type this in 10 minutes; 13 minutes tops if the ribbon needs changing."

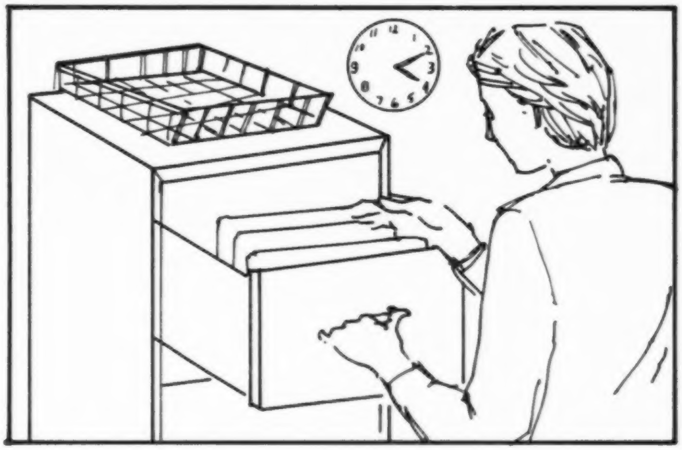
8. Concentrate on one task until it is completed or until a logical stopping point is reached.



9. Work on difficult tasks early in the day when your energy level is higher.


March 6, 1986
8:00 - Type minutes for
8:15 March 10 Board meeting
8:30 - Check conference room set up
8:45
9:00 - Blue Manufacturing
9:15 Conference Room
9:30
Minutes
March 10

10. Work on easier tasks when your energy level is lower.



## DO SKILL SHEET 1

## Decision Making and Organizing Work
# Skill Sheet 1

**Directions:** Study this job description and daily calendar. Then answer the questions that follow.

Job Description: You work in the technical services department of your corporate library. Some of your responsibilites are as follows:

- --process orders for books, films, and video tapes
  - Sometimes the requests for these items are notations in the margins of sales letters.
  - Sometimes the requests are just memo requests, and you have to check publishers and prices.
  - You type purchase orders but must check with supervisor if the price exceeds $100.
  - You get appropriate signatures for the purchase orders.
- --process requests to preview films and video tapes
- --send notices that the materials requested have been ordered
- --send notices that the materials requested have arrived
- --assign code numbers to new materials and enter the data in the computer
- --select appropriate mail service for returning previewed or damaged materials
- --set up previewing sessions
- --take appointment requests for video taping sessions
- --schedule films and tapes for meetings

You have planned your workday as illustrated by the sample calendar shown here.

**Daily Calendar** **March 10**

| | |
|---|---|
| 8:00 | Check desk calendar for any deliveries that need to be made |
| 8:15 | |
| 8:30 | Make deliveries |
| 8:45 | |
| 9:00 | |
| 9:15 | Open incoming mail for the department |
| 9:30 | Process purchase requests |
| 9:45 | |
| 10:00 | |
| 10:15 | |
| 10:30 | Break |
| 10:45 | Assign code numbers to new materials |
| 11:00 | |
| 11:15 | Prepare notice to offices about new materials |
| 11:30 | |
| 11:45 | |
| 12:00 | |
| 12:15 | Lunch |
| 12:30 | |
| 12:45 | |
| 1:00 | |
| 1:15 | Make afternoon deliveries, if needed |
| 1:30 | |
| 1:45 | Open incoming mail for the department |
| 2:00 | Process purchase requests |
| 2:15 | |
| 2:30 | |
| 2:45 | |
| 3:00 | |
| 3:15 | Break |
| 3:30 | Process outgoing mail |
| 3:45 | |
| 4:00 | Update computer list or do filing |
| 4:15 | |
| 4:30 | |
| 4:45 | |

Questions:

1. What tasks are performed by this person each day? ______________________

2. Which tasks require the most attention and energy? ______________________

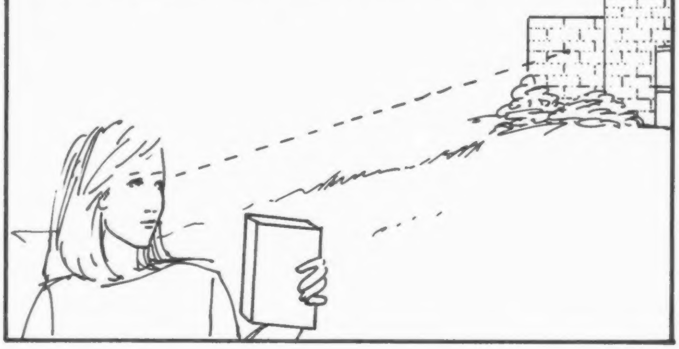
## C. Steps of Procedure for Making Decisions Using the Five-Step Approach

Read the following situation and see how the Five-Step Approach can be applied to it.

Situation: You arrive at Building B Conference Room with a video tape. No one seems to know anything about the tape. You call your department and find that you were supposed to take the tape to Building D. The people there were getting worried about whether the tape would arrive in time for their meeting and had called your boss about the delay.

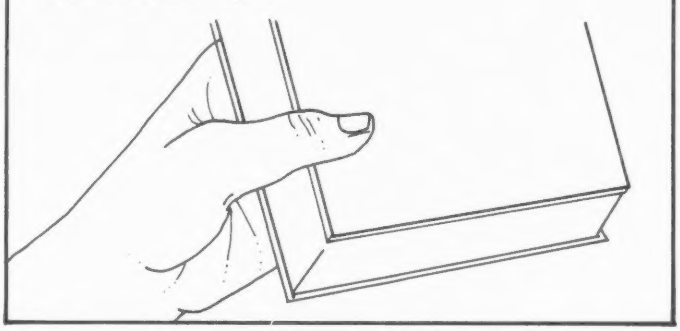
1. Identify the problem.

The tape needs to be delivered to Building D as soon as possible.



2. Identify the facts.

An error has been made.
The video tape you have in hand is the correct tape.



3. Identify alternative solutions.

Say nothing upon your return to the office. Your boss will think it it was your fault.

or

Apologize briefly upon your return to the office and promise that it will never happen again.

or

Double check your instructions with your supervisor when you get back to your desk.

or

Call all offices to confirm their order of materials for conferences before starting out to make deliveries.

or

Complain loudly when you determine that someone else made the mistake.

4. Select the best solution. (Think about what would probably happen if you choose each alternative.)

5. Implement the solution.

Tactfully help other offices and co-workers in your own office to understand that the whole department benefits when messages are accurate.

**DO SKILL SHEET 2**

## Decision Making and Organizing Work
## Skill Sheet 2

**Directions:** Reread the job description given on Skill Sheet 1. Solve the cases given below using the Five-Step Approach.

**Case A:** You receive a telephone request for a video taping session this afternoon at 2. The technician is attending a training seminar and will not be back until 3:30.

Problem: ______________________________
Facts: ______________________________
______________________________
Alternatives: ______________________________
______________________________
Best Solution: ______________________________
How the Solution Will Be
Implemented: ______________________________
______________________________

**Case B:** Your supervisor is away for two days for an out-of-town meeting. You receive a "rush" request for a film which costs $185. Your supervisor must approve and sign purchase orders over $100.

Problem: ______________________________
______________________________
Facts: ______________________________
Alternatives: ______________________________
______________________________
______________________________
Best Solution: ______________________________
How the Solution Will Be
Implemented: ______________________________

## D. Guidelines for Problem Solving

The Five-Step Approach for decision making and problem solving was illustrated in Section C. This section presents a different problem situation, and additional tips are listed to help you in accomplishing each step.

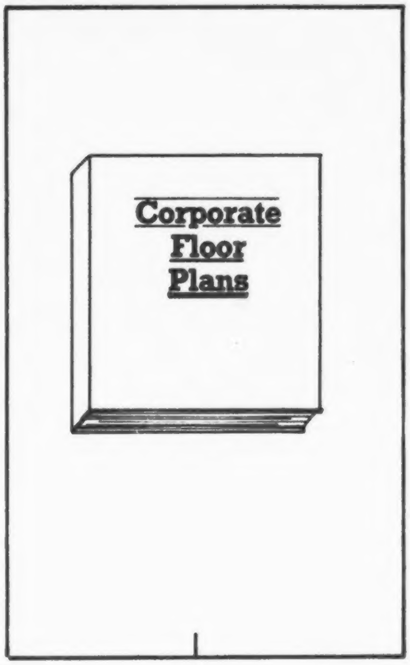
**Situation:** Department X used Conference Room 22 for two hours last week and this week. During their meeting last week, they viewed a 20-minute video tape. This week they viewed a 15-minute video tape. Department Y was kept waiting for ten minutes this week to use the same conference room.

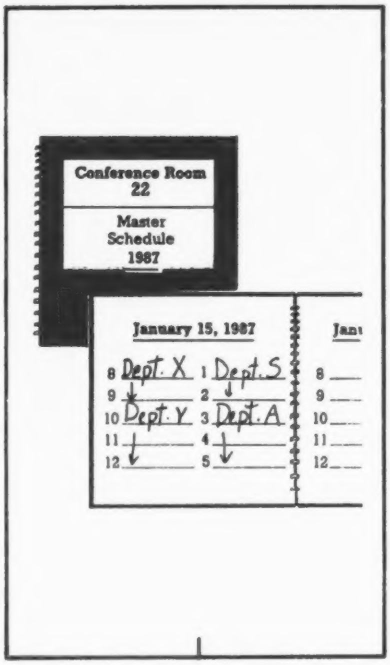
1. Identify the problem -- have a positive attitude.

"Department X just wanted to make Department Y wait to use the room."
"I wonder how I can help schedule the room more effectively."

2. Identify the facts -- avoid guessing by:

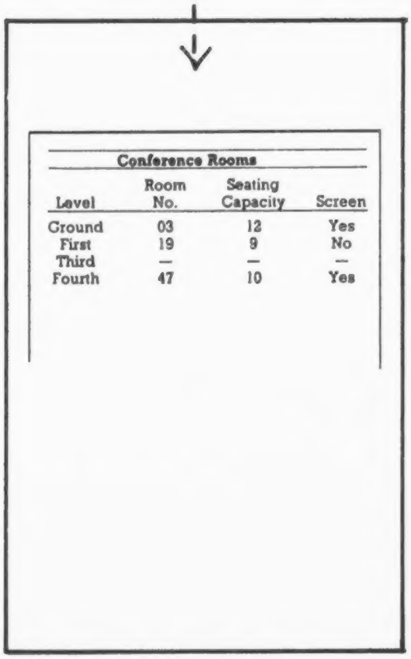
- gathering information,





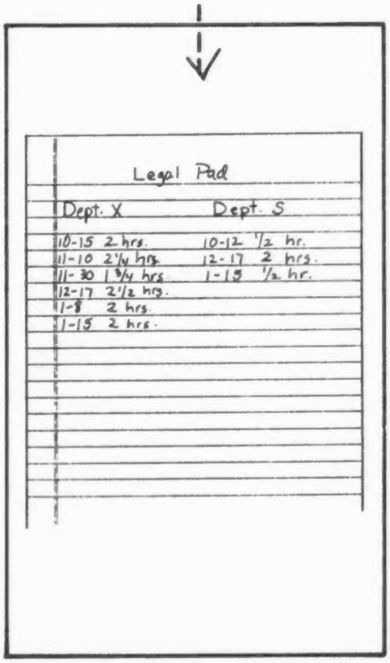
"...and Department Y employs 6 people."
PERSONNEL

- recording, and



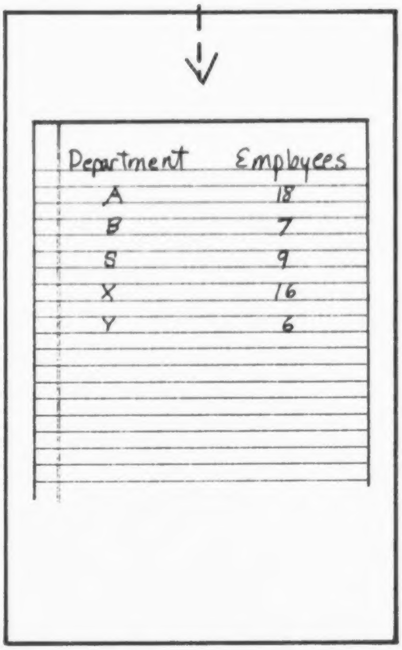
**Conference Rooms**

| Level | Room No. | Seating Capacity | Screen |
|---|---|---|---|
| Ground | 03 | 12 | Yes |
| First | 19 | 9 | No |
| Third | — | — | — |
| Fourth | 47 | 10 | Yes |



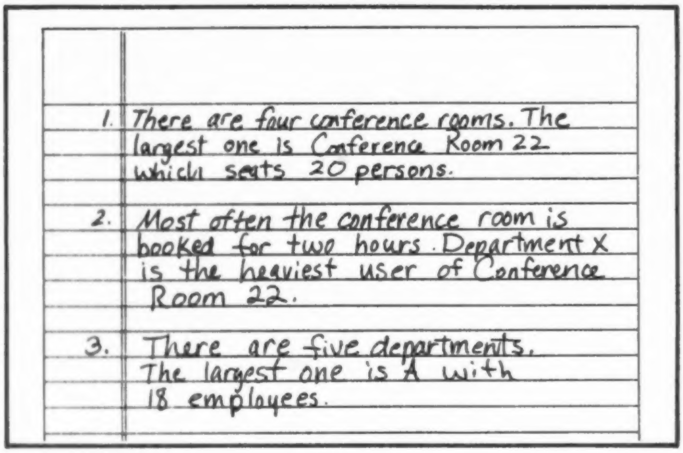
Legal Pad

| Dept. X | Dept. S |
|---|---|
| 10-15 2 hrs. | 10-12 1/2 hr. |
| 11-10 2 1/4 hrs. | 12-17 2 hrs. |
| 11-30 1 3/4 hrs. | 1-15 1/2 hr. |
| 12-17 2 1/2 hrs. | |
| 1-8 2 hrs. | |
| 1-15 2 hrs. | |



| Department | Employees |
|---|---|
| A | 18 |
| B | 7 |
| S | 9 |
| X | 16 |
| Y | 6 |

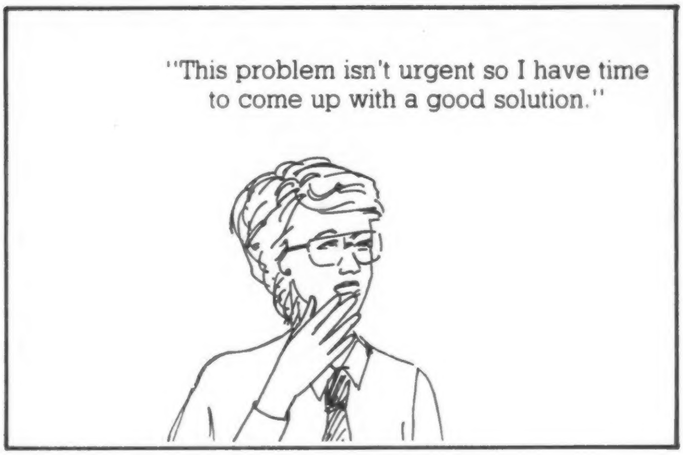
- analyzing data carefully.



1. There are four conference rooms. The largest one is Conference Room 22 which seats 20 persons.
2. Most often the conference room is booked for two hours. Department X is the heaviest user of Conference Room 22.
3. There are five departments. The largest one is A with 18 employees.

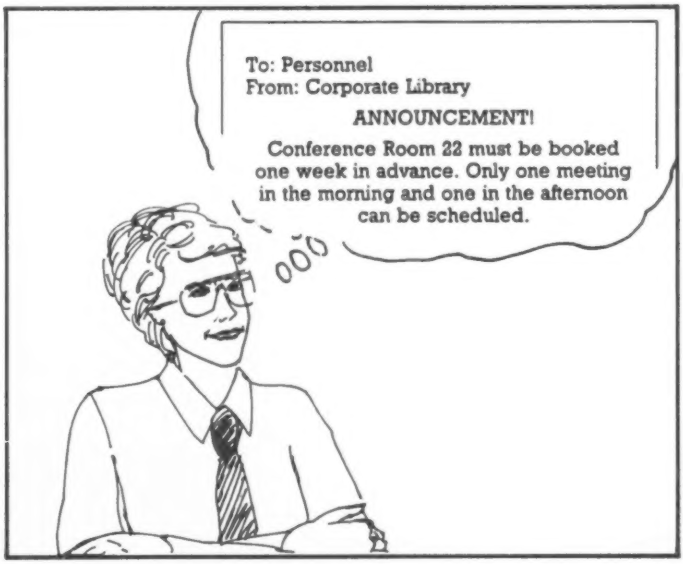
3. Identify possible solutions.

   Allow sufficient time for thinking through a problem and for considering different ways of approaching a solution.


"This problem isn't urgent so I have time to come up with a good solution."

Include activity in problem solving by:

- forming a mental picture,

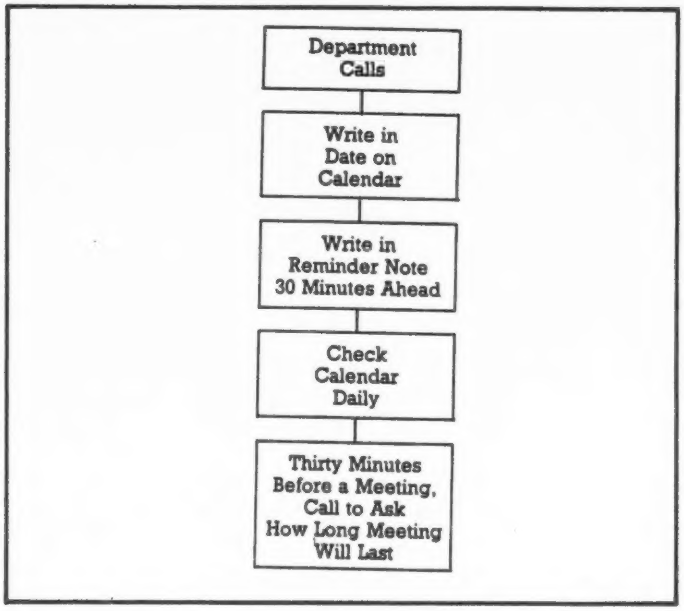


To: Personnel
From: Corporate Library

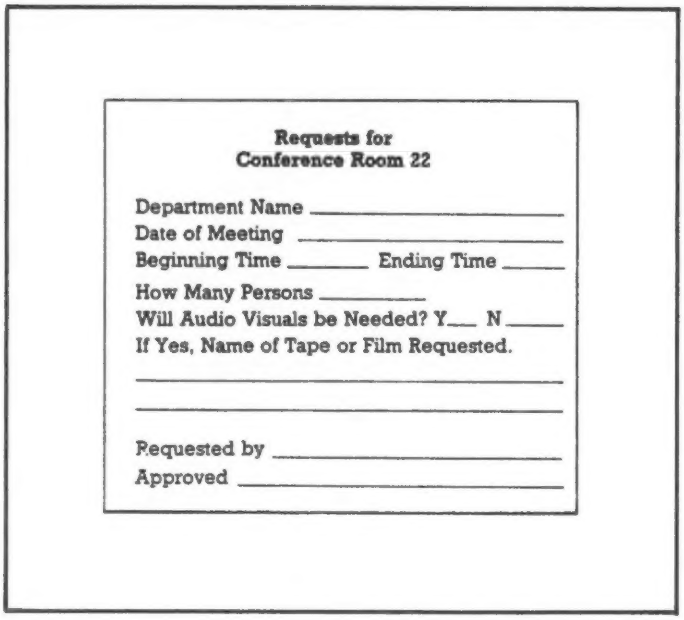
ANNOUNCEMENT!

Conference Room 22 must be booked one week in advance. Only one meeting in the morning and one in the afternoon can be scheduled.

- drawing a flowchart,


Department Calls
Write in Date on Calendar
Write in Reminder Note 30 Minutes Ahead
Check Calendar Daily
Thirty Minutes Before a Meeting, Call to Ask How Long Meeting Will Last

- or by drawing a diagram.



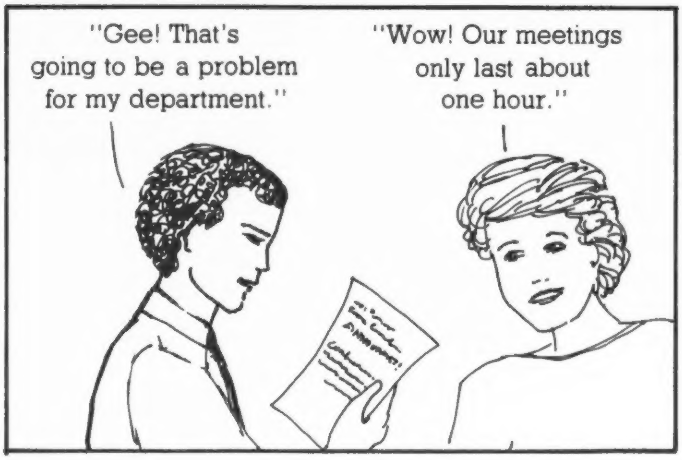
**Requests for Conference Room 22**

Department Name ____________________
Date of Meeting ____________________
Beginning Time ________ Ending Time ______
How Many Persons __________
Will Audio Visuals be Needed? Y___ N_____
If Yes, Name of Tape or Film Requested.
____________________________________
____________________________________

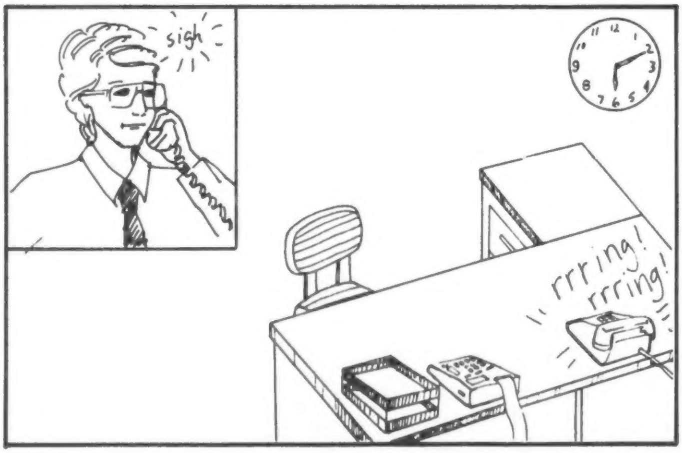
Requested by ______________________
Approved _________________________

4. Select the best solution.

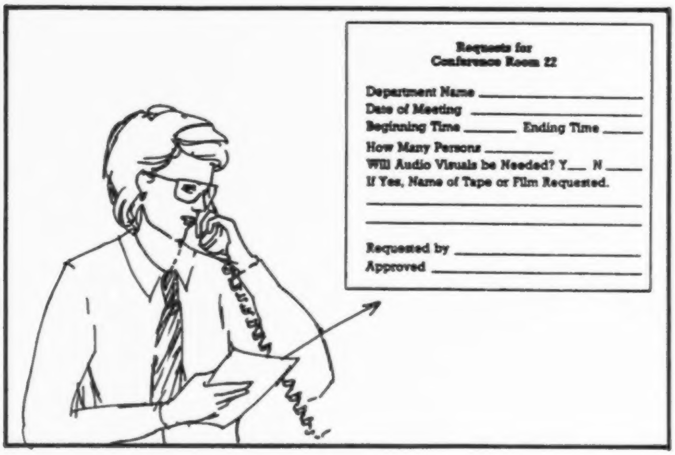
   Imagine the outcomes of possible solutions.


"Gee! That's going to be a problem for my department."
"Wow! Our meetings only last about one hour."

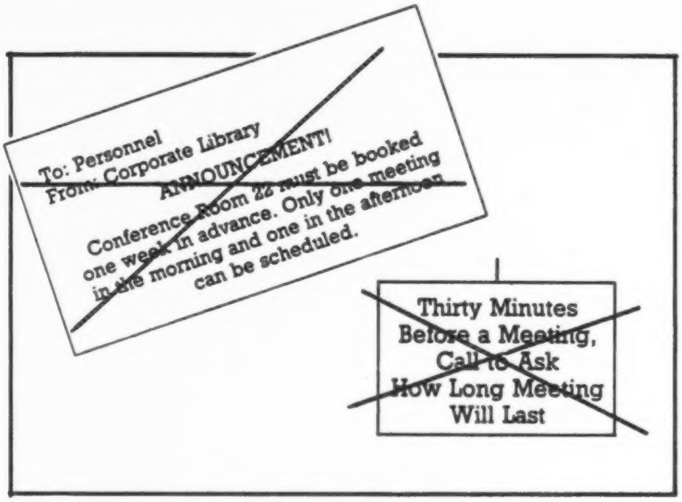
"I'll have to call you back. I'm working on the report for the meeting...



Try out logical solutions to see if they work.



Eliminate solutions that do not seem to "fit" at this time.


~~To: Personnel~~
~~From: Corporate Library~~
~~ANNOUNCEMENT!~~
~~Conference Room 22 must be booked one week in advance. Only one meeting in the morning and one in the afternoon can be scheduled.~~
~~Thirty Minutes Before a Meeting, Call to Ask How Long Meeting Will Last~~

5. Implement the solution.

"Miss Jones, I've been trying out a new form which helps me to schedule the Conference Room. I would like to tell you about it."
SUPERVISOR

**DO SKILL SHEET 3**

# Decision Making and Organizing Work
# Skill Sheet 3

**Directions:** Read each case below and use the five-step approach to decide whether the work requested is a "1," "2," "3," or "4" priority. Fill in the blanks to show the steps in making these decisions.

CASE A: It is time to take inventory of the equipment in your department. You must verify the location of 12 pieces of equipment which appear on a computer list. The completed inventory is due in 10 days.

Problem: ______________________________

Facts: ______________________________

Alternatives: ______________________________

Best Solution: ______________________________

Implement: ______________________________

Priority: ______________________________

CASE B: You return from afternoon break to find two notes on your desk. The video technician leaves a note that you are to call and postpone a taping session scheduled for tomorrow morning. The second note is from your boss. She needs a computer printout of all the additions to the library since the beginning of the year.

Problem: ______________________________

Facts: ______________________________

Alternatives: ______________________________

Best Solution: ______________________________

Implement: ______________________________

Priority of Rescheduling the Taping Session:

______________________________

Priority of Running the Computer Printout:

______________________________

# Decision Making and Organizing Work
## Unit Review

1. List two suggestions for being organized.

   a. ____________________

   b. ____________________

2. List the categories for prioritizing tasks.

   a. ____________________

   b. ____________________

   c. ____________________

   d. ____________________

3. List the five problem-solving steps.

   a. ____________________

   b. ____________________

   c. ____________________

   d. ____________________

   e. ____________________

4. Using the job description from Information Sheet 1 decide if the following tasks are 1, 2, 3, or 4 in priority. Assume today's date is May 14.

A. ____________

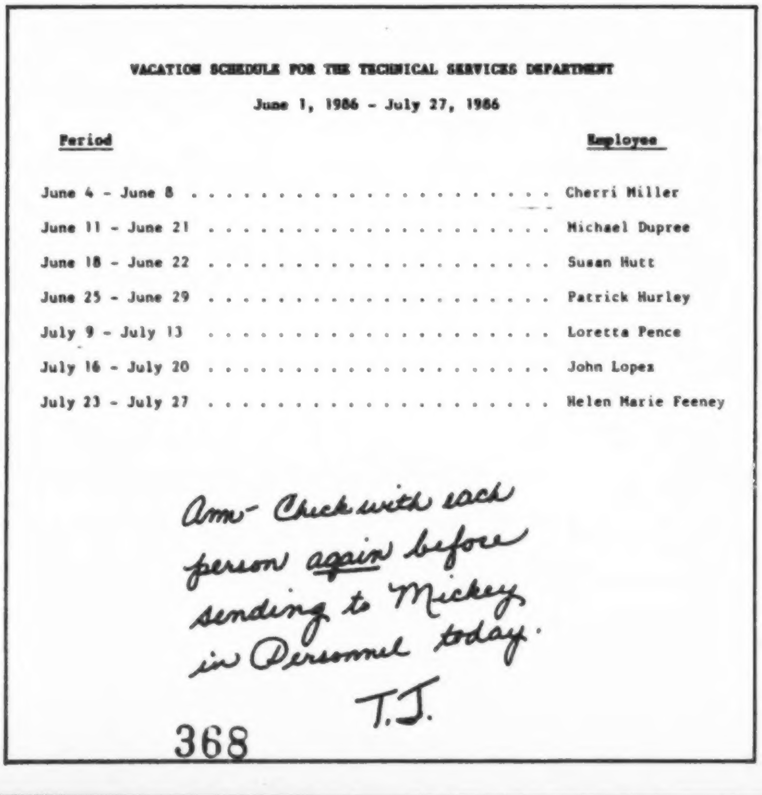
B. ____________

C. ____________

D. ____________

E. ____________

A



VACATION SCHEDULE FOR THE TECHNICAL SERVICES DEPARTMENT

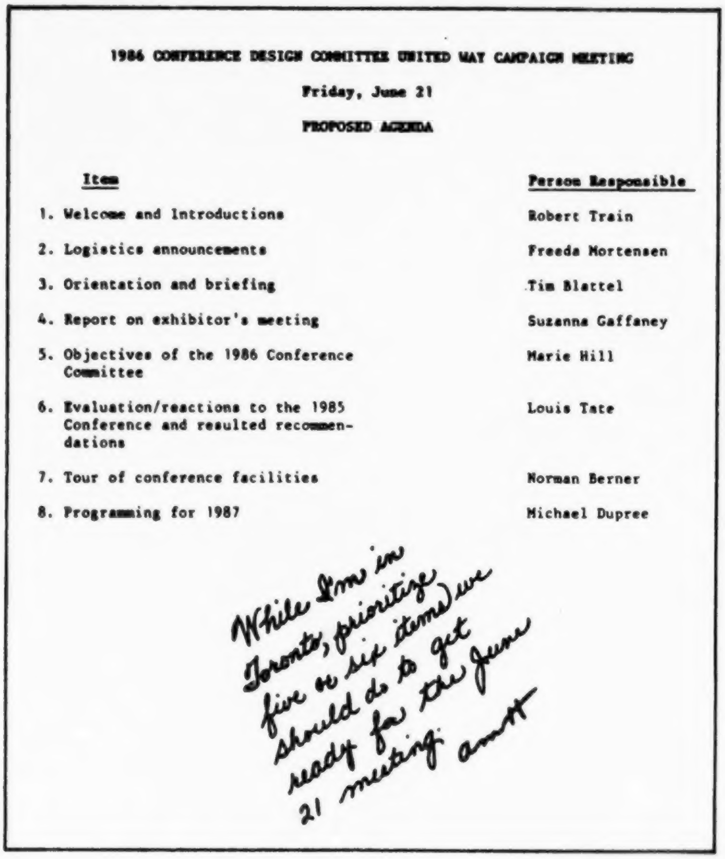
June 1, 1986 - July 27, 1986

| Period | Employee |
|---|---|
| June 4 - June 8 | Cherri Miller |
| June 11 - June 21 | Michael Dupree |
| June 18 - June 22 | Susan Hutt |
| June 25 - June 29 | Patrick Hurley |
| July 9 - July 13 | Loretta Pence |
| July 16 - July 20 | John Lopez |
| July 23 - July 27 | Helen Marie Feeney |

Ann- Check with each person again before sending to Mickey in Personnel today.

T.J.

**B**



**1986 CONFERENCE DESIGN COMMITTEE UNITED WAY CAMPAIGN MEETING**

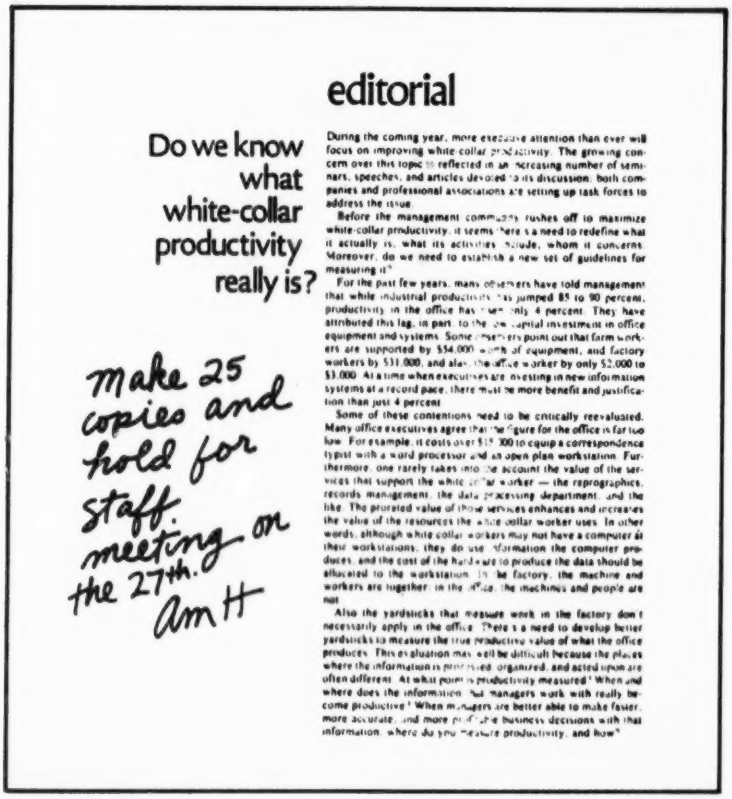
**Friday, June 21**

**PROPOSED AGENDA**

| Item | Person Responsible |
|---|---|
| 1. Welcome and Introductions | Robert Train |
| 2. Logistics announcements | Freeda Mortensen |
| 3. Orientation and briefing | Tim Blattel |
| 4. Report on exhibitor's meeting | Suzanna Gaffaney |
| 5. Objectives of the 1986 Conference Committee | Marie Hill |
| 6. Evaluation/reactions to the 1985 Conference and resulted recommendations | Louis Tate |
| 7. Tour of conference facilities | Norman Berner |
| 8. Programming for 1987 | Michael Dupree |

While I'm in Toronto, prioritize five or six items we should do to get ready for the June 21 meeting. AMH

**C**



# editorial

## Do we know what white-collar productivity really is?

During the coming year, more executive attention than ever will focus on improving white-collar productivity. The growing concern over this topic is reflected in an increasing number of seminars, speeches, and articles devoted to its discussion; both companies and professional associations are setting up task forces to address the issue.

Before the management community rushes off to maximize white-collar productivity, it seems there's a need to redefine what it actually is, what its activities include, whom it concerns. Moreover, do we need to establish a new set of guidelines for measuring it?

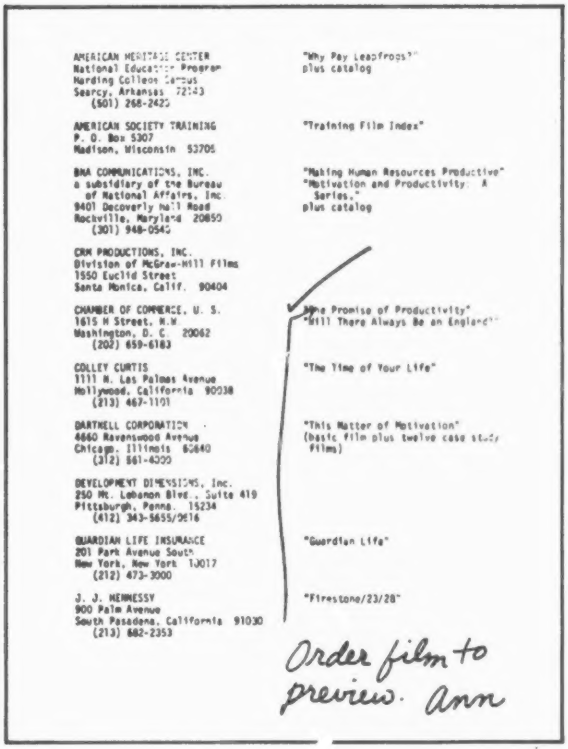
For the past few years, many observers have told management that while industrial productivity has jumped 85 to 90 percent, productivity in the office has risen only 4 percent. They have attributed this lag, in part, to the low capital investment in office equipment and systems. Some observers point out that farm workers are supported by $34,000 worth of equipment, and factory workers by $31,000, and alas, the office worker by only $2,000 to $3,000. At a time when executives are investing in new information systems at a record pace, there must be more benefit and justification than just 4 percent.

Some of these contentions need to be critically reevaluated. Many office executives agree that the figure for the office is far too low. For example, it costs over $15,000 to equip a correspondence typist with a word processor and an open plan workstation. Furthermore, one rarely takes into the account the value of the services that support the white collar worker — the reprographics, records management, the data processing department, and the like. The prorated value of those services enhances and increases the value of the resources the white collar worker uses. In other words, although white collar workers may not have a computer at their workstations, they do use information the computer produces, and the cost of the hardware to produce the data should be allocated to the workstation. In the factory, the machine and workers are together; in the office, the machines and people are not.

Also the yardsticks that measure work in the factory don't necessarily apply in the office. There's a need to develop better yardsticks to measure the true productive value of what the office produces. This evaluation may well be difficult because the places where the information is processed, organized, and acted upon are often different. At what point is productivity measured? When and where does the information that managers work with really become productive? When managers are better able to make faster, more accurate, and more profitable business decisions with that information, where do you measure productivity, and how?

Make 25 copies and hold for staff meeting on the 27th. AmH

D



| | |
|---|---|
| AMERICAN HERITAGE CENTER<br>National Education Program<br>Harding College Campus<br>Searcy, Arkansas 72143<br>(501) 268-2423 | "Why Pay Leapfrogs?"<br>plus catalog |
| AMERICAN SOCIETY TRAINING<br>P. O. Box 5307<br>Madison, Wisconsin 53705 | "Training Film Index" |
| BNA COMMUNICATIONS, INC.<br>a subsidiary of the Bureau of National Affairs, Inc.<br>9401 Decoverly Hall Road<br>Rockville, Maryland 20850<br>(301) 948-0540 | "Making Human Resources Productive"<br>"Motivation and Productivity: A Series,"<br>plus catalog |
| CRM PRODUCTIONS, INC.<br>Division of McGraw-Hill Films<br>1550 Euclid Street<br>Santa Monica, Calif. 90404 | |
| CHAMBER OF COMMERCE, U. S.<br>1615 H Street, N.W.<br>Washington, D. C. 20062<br>(202) 659-6183 | "The Promise of Productivity"<br>"Will There Always Be an England?" |
| COLLEY CURTIS<br>1111 N. Las Palmas Avenue<br>Hollywood, California 90038<br>(213) 467-1101 | "The Time of Your Life" |
| DARTNELL CORPORATION<br>4660 Ravenswood Avenue<br>Chicago, Illinois 60640<br>(312) 561-4000 | "This Matter of Motivation"<br>(basic film plus twelve case study films) |
| DEVELOPMENT DIMENSIONS, Inc.<br>250 Mt. Lebanon Blvd., Suite 419<br>Pittsburgh, Penna. 15234<br>(412) 343-5655/0616 | |
| GUARDIAN LIFE INSURANCE<br>201 Park Avenue South<br>New York, New York 10017<br>(212) 473-3000 | "Guardian Life" |
| J. J. HENNESSY<br>900 Palm Avenue<br>South Pasadena, California 91030<br>(213) 682-2353 | "Firestone/23/28" |

Order film to
preview. Ann

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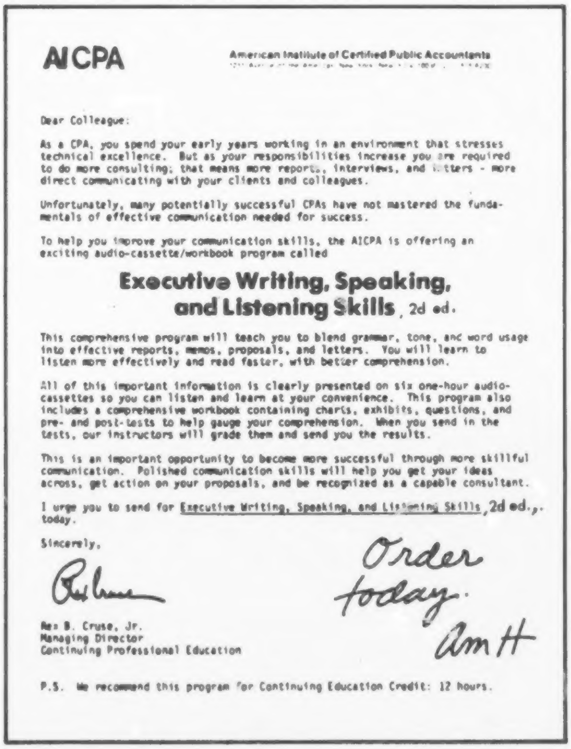
E



AICPA
American Institute of Certified Public Accountants

Dear Colleague:

As a CPA, you spend your early years working in an environment that stresses technical excellence. But as your responsibilities increase you are required to do more consulting; that means more reports, interviews, and letters - more direct communicating with your clients and colleagues.

Unfortunately, many potentially successful CPAs have not mastered the fundamentals of effective communication needed for success.

To help you improve your communication skills, the AICPA is offering an exciting audio-cassette/workbook program called

**Executive Writing, Speaking, and Listening Skills**, 2d ed.

This comprehensive program will teach you to blend grammar, tone, and word usage into effective reports, memos, proposals, and letters. You will learn to listen more effectively and read faster, with better comprehension.

All of this important information is clearly presented on six one-hour audio-cassettes so you can listen and learn at your convenience. This program also includes a comprehensive workbook containing charts, exhibits, questions, and pre- and post-tests to help gauge your comprehension. When you send in the tests, our instructors will grade them and send you the results.

This is an important opportunity to become more successful through more skillful communication. Polished communication skills will help you get your ideas across, get action on your proposals, and be recognized as a capable consultant.

I urge you to send for Executive Writing, Speaking, and Listening Skills, 2d ed., today.

Sincerely,

Rex B. Cruse, Jr.
Managing Director
Continuing Professional Education

Order
today.
Ann H

P.S. We recommend this program for Continuing Education Credit: 12 hours.

# Decision Making and Organizing Work
# Performance Checklist

Student ______________________________ has successfully performed the following steps of procedure.

| Organized Office Work | Yes | No | Comments |
|---|---|---|---|
| 1. Reviewed company procedure manual | | | |
| 2. Reviewed work flow | | | |
| 3. Organized work space | | | |
| 4. Planned daily schedule | | | |
| 5. Prioritized tasks | | | |
| 6. Set deadlines for tasks | | | |
| 7. Stayed on task | | | |
| 8. Completed difficult tasks early | | | |
| 9. Completed easier tasks at low energy level times | | | |

| Used Decision Making Techniques | Yes | No | Comments |
|---|---|---|---|
| 1. Identified the problem | | | |
| 2. Identified the facts | | | |
| 3. Identified alternative solutions | | | |
| 4. Selected best solution | | | |
| 5. Implemented solution | | | |

| Used Problem-Solving Techniques | Yes | No | Comments |
|---|---|---|---|
| 1. Identified the problem | | | |
| 2. Gathered information | | | |
| 3. Recorded data | | | |
| 4. Analyzed data | | | |
| 5. Identified possible solutions | | | |
| 6. Tried logical solutions | | | |
| 7. Eliminated inappropriate solutions | | | |
| 8. Selected the best solution | | | |
| 9. Implemented best solution | | | |

Satisfactory - Should Move On ☐
Repeat This Unit ☐

____________________________ Student Signature/Date

____________________________ Instructor Signature/Date